



AMERICAN ASSOCIATION OF  
EDUCATIONAL SERVICE AGENCIES

# **ANNUAL REPORT**

**1994-1995**

**American Association of Educational  
Service Agencies**



October 25, 1995

Dear Fellow AAESA Members:

It is both a privilege and a pleasure to write this letter to you on behalf of the AAESA Council and staff.

AAESA has experienced its most outstanding year in our history due to the tremendous support and participation from you, the membership, and the great leadership demonstrated by the Council and staff. Membership is at an all time high of 415, an increase of almost 100 percent in the last four years! Executive Director Bruce Hunter and Director of Member Services Lee Christiansen have done exemplary work to achieve this record.

For the first time in our history we have fiscal integrity. We have an accurate accounting of revenues and expenditures along with membership dues and payments, and a complete system of program budgeting. Bruce Hunter and Peter Young, ACES in Hamden, Connecticut, have worked closely together to achieve this milestone.

During the past year, AAESA published the first journal under the able editing of William Keane entitled *Perspectives*. We have also redesigned, reformatted and upgraded our AAESA newsletter.

Harry Beavers of Texas is hosting the biggest and best AAESA Fall Conference ever -- not a small feat after a string of truly outstanding conferences. George Woons of Michigan has put together a Pre-Conference Seminar that will prove to be an outstanding experience for those attending the AASA National Conference on Education.

The annual We Care Legislative Conference, which is a joint venture of AASA and AAESA, also set an attendance record this year. The number of ESA participants including board members continues to grow. And, most encouragingly, the number of ESA staff taking a leadership role on federal legislative issues has grown steadily.

Because of the background work done by our colleagues in Michigan and Pennsylvania, AAESA had the most successful legislative thrust ever. In 1994, Bruce Hunter challenged the state associations in Michigan and Pennsylvania to produce recommendations to serve as the basis for discussions of AAESA policies on vocational education and special education. During the past

## 1995 President's Letter (cont'd)

year we have had our definition of educational service agency included in the new job-training block grant that will replace the Perkins Vocational Education Act and the early drafts of the Individuals with Disabilities Education Act, IDEA. Also, several of our recommendations have been included in the new job-training block grant and the early drafts of IDEA. These accomplishments were done by Executive Director Hunter with the able assistance of Nick Penning and the new legislative assistant, Kari Arfstrom.

We have continued to improve our member services, as those of you who have had the occasion to call our office know. Our newest staff person, Melissa Adkins, has provided immediate, able service on member requests, and helped immeasurably in meeting planning and logistics.

We have established our first business partnership which will help chart the course for AAESA to become a market-driven, entrepreneurial organization that will deliver added value to the members. The partner is Great American Life Insurance Company (GALIC), a premier annuity company.

The Council members are as follows. They deserve a special tribute for their dedication and truly outstanding leadership; they have made hard decisions and proposed creative initiatives on your behalf.

East Region -	Peter Kachris, New York Joseph Lagana, Pennsylvania Virginia Seccombe, Connecticut
Midwest Region-	Ronald Dickinson, Iowa Glen Shaw, Minnesota George Woons, Michigan
West Region -	Harry Beavers, Texas James Miller, Colorado Boyd Swent, Oregon

My very best wishes are extended to Joe Lagana, President-elect. Joe is an extremely talented leader who needs your continued support to guide AAESA on this track of growth and quality service to you.

Thank you for a great year.

Sincerely,

Glen D. Shaw  
President



TO: AAESA Members

FROM: Bruce Hunter, Executive Director

DATE: November 30, 1995

RE: Executive Director's Report

The past year, 1994-1995, has been another very good year for AAESA in terms of membership, finances, member participation, publications and meeting activities.

Through the efforts of Lee Christiansen and the Executive Council, AAESA has doubled its membership in the last three years, growing from about 200 members to 415 paid members in 1994-95. Most heartening has been the addition of all Educational Service Agencies, ESAs, in eight states: Arkansas, California, Colorado, Illinois, Kansas, Nebraska, New Jersey, and West Virginia. The increased membership is a tribute to the quality of professional development experiences offered at the Fall Conference and Leadership Seminar, and the power of professional networking through AAESA meetings and publications.

During the past year, AAESA published a new journal, *Perspectives*, which is the first and only such publication dedicated to enlarging and sharing the knowledge base regarding ESAs. The journal, produced and edited through the efforts of William Keane, former AAESA President, has been enthusiastically received by the membership. The Executive Council, decided that another issue of *Perspectives* would be published in 1996. The Council has commended Dr. Keane for his excellent work, which represents the first journal dedicated entirely to educational service agencies.

Last year we upgraded our newsletter, *AAESA News*, to include more news in a more attractive format.

The 1994 Fall Conference in Palm Springs, California, set yet another attendance record for the fourth consecutive year. Meeting attendance has increased yearly since the Executive Council, under the leadership of David Calchera, decided that the Fall Conference would be planned and conducted by an AAESA member agency. The wisdom of relying on educational service agency staff to plan and conduct a meeting for their colleagues has resulted in high evaluations and even higher attendance. And, as we begin the 1995 Fall Conference, attendance has jumped from 299 paid registrants to about 400. The continuing success of the Fall Conference in 1995 is testimony to the excellent work of Dr. Harry Beavers and the staff of the Region XII Education Service Center in Waco, Texas.

## **1995 Executive Director's Report (continued)**

The Leadership Seminar, held just prior to the AASA National Conference, also went extremely well in 1994-95. The 1994-95 Seminar was built around a video tape of students commenting on their schools. All speakers addressed the issues surrounding schools for the 21st century, and many commented on the issues raised by the students.

Financially 1994-1995 was a break-the-mold year for AAESA. During 1995, dues and meeting registrations were collected for AAESA by Area Cooperative Educational Services, ACES, in Hamden, Connecticut. As a result of the work of Peter Young, Executive Director of ACES and former AAESA Executive Council member, we collected a record amount of dues and had much better follow up with members on dues questions. ACES has worked very well with AASA, which keeps the expenditure records, so we have the clearest and cleanest financial records, since the organization was established in the 1970s. The Executive Council has commended Peter Young and his staff for their effort in cleaning up our dues and registration records. In 1995, AAESA finished with a balance of \$16,000 (unaudited), which leaves us with a fund balance of \$31,000 or about 15 percent of the annual budget.

While we were succeeding in our professional and organizational efforts, we also had a good year in advocating for ESAs in the Congress. Based on recommendations from members in Michigan, Pennsylvania, and Washington we developed extensive recommendations for the two major bills up for reauthorization in Congress, the Carl D. Perkins Vocational Education Act and the Individuals with Disabilities Education Act, IDEA. Our first goal was to build ESAs into the reauthorization of the Perkins Act, and IDEA. Although neither bill is through the legislative process at this time, we have succeeded in getting our definition into both bills in a way that should benefit ESAs everywhere. There is still much to do in IDEA, where we asked for extensive changes in the formula, due process, attorney's fees, and student discipline. The Perkins Act has been folded into a job-training block grant, which should be finished in 1995. However, IDEA will likely carry over into 1996, before it is finished.

There are challenges in the coming year for AAESA, including the need to develop a database to help state legislatures and state boards of education understand the value of cooperative action to improve schools and schooling. And, like all membership organizations, AAESA must continually improve the way it listens to and serves its members.

AAESA has had extraordinary elected leaders, who have helped the organization grow. This Council and President Glen Shaw have again represented the best in American education by serving selflessly on your behalf, toward the betterment of schools for all children. Because the strength of AAESA is member involvement and because we have had leaders that fostered and caused greater member involvement, AAESA continues to grow and improve.

**AAESA 1994-1995 FINANCIAL SUMMARY**  
(subject to Audit)

**ADMINISTRATION**

<u>REVENUE</u>		<u>EXPENDITURES</u>		
		BUDGET	ACTUAL	
Membership	\$102,571	Goods Sold	800	865
		Salary/Benefits	21,725	6,540
Sales	6,377	Fees	17,500	25,328
		Supplies	3,600	537
Other	<u>304</u>	Communications	2,500	4,537
	\$109,252	Mail/Shipping	4,850	4,352
		Production	8,600	5,364
		Travel	25,600	38,881
		Meeting/Conference	3,968	7,534
		Dues	750	0
		Insurance	2,550	2,550
		Other	0	36
		Loan Payment	<u>0</u>	<u>6,698</u>
		<b>TOTAL</b>	<b>\$92,443</b>	<b>\$103,222</b>

**EVENTS**

<u>REVENUE</u>		<u>EXPENDITURES</u>	
Registrations	\$76,255	Fees	9,533
		Supplies	2,318
Sponsors	<u>8,800</u>	Mail Shipping	979
	\$85,055	Production	5,598
		Travel	8,247
		Meeting/Conference	45,365
		Refunds	<u>2,800</u>
			\$74,840

**SUMMARY**

REVENUES	\$194,307
EXPENDITURES	<u>- 178,062</u>
	\$ 16,245

# AAESA 1995 MEMBERSHIP REPORT

Prepared by  
*Lee E. Christiansen*

Membership activities have been a continuing highlight for AAESA during the 1994-95 year. New memberships have been added, retention of current members has been exceptional, and participation continues to increase in AAESA programs and projects. Since 1992 AAESA membership has increased from 260 agencies to 460.

This year, the 15 *Arkansas* Education Service Cooperatives and the 45 *Illinois* Regional Offices of Education became part of AAESA through state memberships, meaning 100 percent of the ESAs in each of these states are now members. The following chart identifies the name and charter year of those states with current AAESA "State Memberships."

<u>Pre-1992</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>
Alaska	Indiana	Kansas	California	Arkansas
Connecticut	Texas	Nebraska	Colorado	Illinois
Iowa	Washington		New Jersey	
Michigan	Wisconsin		West Virginia	
Minnesota				
New York				
Oregon				
Pennsylvania				

States with individual ESA memberships in AAESA include:

Georgia	Massachusetts	South Carolina	Wyoming
Kentucky	Ohio	Utah	

The AAESA Council and staff will continue to encourage state memberships since these memberships provide a substantial reduction in annual dues, and tend to strengthen both the state association and AAESA. It is important for us to work with those states that have non-member ESAs to enable them to benefit from participating in the national professional association dedicated to furthering regional programs for local schools and school districts.

In the area of membership publications, AAESA produced and distributed its annual membership roster, a new membership information flyer, and an updated "Questions Asked About ... Educational Service Agencies" -- which has proven extremely valuable in explaining the role of ESAs in public education.

In addition to its publications, AAESA has continued to provide outstanding membership services through its professional development, legislative advocacy, membership communication and networking, and ESA advocacy/technical assistance programs.

# STRATEGIC PRIORITIES

## BACKGROUND:

Strategic priorities were established at the April 21-22, 1995 meeting of the AAESA Executive Council in Minneapolis, as part of the regular update and revision of the AAESA strategic plan. The 1996 fiscal year budget was developed to address these priorities. Regular reports on these activities through Executive Council minutes and *AAESA News* will be made to the membership. The Executive Council will review progress on these priorities, and the appropriateness of each priority at its spring 1996 meeting.

## STRATEGIC PRIORITIES:

### 1. Communication

- Keep membership informed ASAP (National)
- Commission a monograph (Who We Are and What We Do)
- Expand publications
- Expand Internet communications
- Consider "Conversations" via E-mail or meetings to explore specific topics such as School-to-Work, new products, etc.
- Improve communications (newsletters, Internet, etc.)
- Create a clearinghouse for information

We plan to improve and expand communications to members through newsletter articles on successful programs and practices, Internet linkages, and necessary awareness and training activities. We will commission a publication (monograph) that will clearly define ESAs and will give examples of successful programs provided by member agencies.

### 2. Legislation

- Establish a regular legislative process for AAESA
- Initiate legislation (Title III Type/ESA/Build Capacity/Reinvent Government)
- Consider legislation link in each state/network (state ESA Director)
- Develop a legislation/incentive system for use of ESA services (i.e., New York BOCES)
- Plan a Legislative Exchange Meeting
- Create incentive funding for technology
- Work on state-level legislation

We will establish a legislative network for AAESA with primary focus areas as follows:

- a. Develop specific recommendations around legislative initiatives on key issues;
- b. Create a rapid-communications system between national and state agencies;
- c. Develop an "Idea Exchange" system between states concerning legislation activities. The Exchange would spread the word on promising initiatives and provide a "heads-up" to colleagues for damage control.



## STRATEGIC PRIORITIES (continued)

### 3. New Products and Services

- Improve our marketing for products and meetings (nationally and within states) -- topical conference
- Establish a think-tank process for critical issues
- Develop a roll-out plan for initiatives
- Develop an entrepreneurial technical assistance service
- Build image for ESAs nationally and within individual states

Develop a process to determine needs of member districts relative to new products and services by bringing together on a regional basis representatives of as many states as possible and by surveying member districts.

### 4. Leadership

- Develop a conceptual model of what leadership should look like with a common set of principles
- The primary purpose of AAESA should be to develop leadership for service agencies

AAESA's primary mission is to help agency leaders develop leadership skills for the 21st century. Strategies:

- a. Ensure the Fall Conference contains a leadership strand
- b. Focus the Spring Preconference Seminar on necessary leadership skills for the 21st century
- c. Establish ad-hoc committees to:
  - analyze relative research
  - develop leadership profile
  - recommend to council a plan for leadership skill building
  - recommend to AAESA Council a plan to link leadership skill development with AASA to meet the needs of all school leaders

### 5. Finances

- Expand the revenue base to be less dependent on dues.
- Ensure the Executive Council acts responsibly for financial solvency.

We will expand our revenue base to enhance our long-term financial stability so that we can expand membership services.

# 1995-1996 AAESA WHO's WHO

## **PRESIDENT** (Midwest Region)

*Dr. Glen D. Shaw*  
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Southwest State Univ.  
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## **PRESIDENT-ELECT** (East Region)

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Executive Director  
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## **PAST PRESIDENT** (West Region)

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Superintendent  
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## **MIDWEST REGION**

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*Dr. George J. Woons*  
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## **EAST REGION**

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District Superintendent  
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## **WEST REGION**

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## **STAFF**

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## **SCHEDULE OF AAESA 1996 EVENTS**

### **1996 Legislative Policies and Priorities**

January 19-20, 1996

AAESA Office  
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*Contact:*

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### **1996 Leadership Seminar**

March 7, 1996

San Diego Marriott Hotel and Marina  
San Diego, Ca

*Contact:*

George Woons  
Superintendent  
Kent Intermediate School District  
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### **1996 Fall Conference**

December 5-6-7, 1996

Crown Plaza Resort  
Hilton Head, SC

*Contact:*

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