

History of the Association of Educational Service Agencies



40th Anniversary Edition

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December 2001
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Acknowledgement

AESA acknowledges and thanks all who contributed to this history of the Association of Educational Service Agencies. Special recognition is given to Lee Christiansen for compiling and writing the original transcript of this document and to Brian Talbott for updating our history through 2016, the year of our 40th Anniversary.

History of the Association of Educational Service Agencies

By Dr. Lee Christiansen and Dr. Brian L. Talbott

Introduction

This document presents the history of the Association of Educational Service Agencies. It includes early 1960s discussion sessions; the agency's 1970s origin as the National Organization of County, Intermediate and Educational Service Agencies (NOCIESA) within the American Association of School Administrators (AASA); its 1980s development and name change to the American Association of Educational Service Agencies (AAESA); its dramatic membership and program development growth in the 1990s as it became a truly independent professional association; and its recent 1999 name change to the Association of Educational Service Agencies (AESA).

The first chapter, "The Beginning of a Professional Association," was written by Lee Christiansen for the 25th Anniversary of AESA. Lee served as the Executive Director from 1992-1995. Chapter 1 covers the years from 1967 to 2001. Sadly, Lee passed on September 9, 2016. Chapter 2, "AESA Coming of Age" was written by Brian Talbott and covers the AESA history from 2001 through 2016 and was completed to celebrate the 40th Anniversary of AESA. As with most organizations, committed people formed AESA and this chronology of events attempts to recognize the individuals who were and have been integrally involved and committed to the establishment and the continual development of AESA. In constructing this document there is little question we have unknowingly omitted contributing individuals or activities that should have been included. As you read through the material and notice such omissions, please email your information to John Bass at jbass@aesa.us so that it can be included and/or corrected in future publications. It is AESA's desire that this document be continually updated by documenting the future of educational service agencies as the new millennium unfolds.

Dedication

This past summer I had the opportunity to talk with Lee Christiansen and shared that I had been asked by AESA to write Chapter 2 of our history. During our discussion, we talked about the fact that Peter Young, AESA's Chief Financial and Operating Officer, would be retiring at the end of 2016. We both agreed that Peter was the one person who was not only part of the initial meetings that formed AESA, but who also continued to serve AESA through 2016. Because of his dedication and commitment to AESA, both as a leader and a friend to each of us and to everyone who has ever been associated with AESA, both Lee and I agreed that this second edition of the History of AESA would be dedicated to Peter Young.

Part I: The Beginning of a Professional Association (1967-2001)

The early stages of AESA are first noted in a September 1, 1967 letter from Robert Isenberg, director of NEA Rural Education Service Division (later the National Rural Education Association), and William J. Ellena, associate secretary of AASA, to Dr. E. Robert Stephens, professor of education at the University of Iowa, Iowa City, Iowa, stating, "As you know, effective and economical provision of a comprehensive program of services for children is beyond the capability of many local school districts." It was this letter that designated these two

educational groups, AASA and NEA/REA, as those who would cooperatively undertake ways in which local school districts might be strengthened and enhanced through the appropriate establishment and utilization of regional service agencies. There is no question the original beginning of what we now know as the Association of Educational Service Agencies had its roots firmly entrenched in the improvement of instruction for children in public education.

When Robert Isenberg moved to AASA the following summer, it became evident AASA would provide the forum for the future organization as noted in Isenberg's and Ellena's August 23, 1968, memo charging the AASA Commission on Regional Service Agencies to develop a "plan of action" to provide regional service agency services. This multi-year plan was based on the hypothesis that regional service agencies serving multiple school districts offer an effective means for providing essential educational and administrative services within the legal structure of a modern state system of public schools. It should be noted the plan's emphasis throughout the final document would emphasize the "consumer – the local school district." It also presented the demand for cooperation; basic beliefs about schools; models for education service agencies; a criterion of excellence; and the relationships between and among educational service agencies, state departments of education and local school districts.

In subsequent years, regional service agency leaders continued to meet to share their needs and interests within REA and AASA regular conferences and conventions and within AASA's Committee for County and Regional Superintendents. However, the group continued to struggle for leadership and program services as their intent and needs went well beyond those of an AASA Committee. The group had their own professional agenda that needed to be addressed and the group's concerns increased with the untimely passing away of their strong supporter, Robert Isenberg, and when William Ellena accepted the superintendency in Charlottesville, Virginia. It was this situation that prompted Justus A. Prentice, BOCES superintendent in West Nyack, New York, to write Dr. Paul Salmon, executive secretary of AASA, requesting that AASA provide the necessary leadership for this growing group. Dr. Salmon recognized the request and although the group initially continued to meet within AASA's committee structure there remained a need for the group to form a discreet organization for educational service agencies. Dr. Salmon acknowledged this need and facilitated the group's development over the next three years with the understanding that the new group would remain within the umbrella of AASA (Appendix A presents the organizational activities between 1975 and 1977).

In 1976, Larry Hutchins, of the National Institute of Education (NIE), working with the newly formed National Committee on Regional Education Service Agencies with Dr. Walter G. Turner (CO), chairman, facilitated the funding of a grant from the National Institute of Education to conduct an NIE-AASA conference on regional education to further establish the organization. NIE believed such a network would enable educational research, information, and programs to be more efficiently communicated within the educational community. The available funding provided four regional meetings for individual executive directors to distribute information and recruit membership for the organization. The four meetings were held in Denver, Colorado; San Francisco, California; Detroit, Michigan; and College Park, Maryland.

The essence of each of the four meetings was overwhelmingly supported and, as noted in Walter G. Turner's June 17, 1976 memo to the committee, a national organization should be established

to provide programs to give “legislative input, program exchanges, and promotion of the regional education concept.” On the basis of the four regional sessions, a planning and negotiation meeting was set by the committee for July 8-9, 1976, with AASA Executive Director Dr. Salmon to formalize an arrangement by which AASA would provide a list of services and an associate director to serve under AASA’s direction in providing such services.

As per chairman Walt Turner’s subsequent July 12, 1976, memo, the above meeting also established an initial ad hoc committee including Leo Blodgett (WA), Tom Summerville (OR), Justus Prentice (NY), Glen Hoffman (CA), Dan Rohrback (PA), Calvin Bones (IA), Al Goldberg (MI), Earl Patton, (IL), Tom Lawrence, (TX), Udell Hughes (NE), and Bob Cooley (CO). Dr. Robert Stephens, formerly of the University of Iowa and now with the University of Maryland, served as a consultant and William Anderson (IA) served as the AASA Executive Council representative to the group and James Kirkpatrick and Paul Salmon represented AASA. Later the ad hoc committee added Urey Arnold (MI), Walter Bishop (IL), and Donald Caudill (WV).

In its first years, the organization’s major effort was directed toward the development of the statement of purpose and philosophy, bylaws, staffing, fiscal management, governance, membership program (Charter Member Organizations are noted in Appendix B), dues, operating contract with AASA, and meeting structure for the organization. There was considerable discussion in the naming of the new association to ensure all service agencies would be included. The name selected was the National Organization of County, Intermediate, and Educational Service Agencies (NOCIESA). The original bylaws served as the basis for the bylaws the association operates under today. (See Appendix C for the current bylaws).

At the February, 1977 AASA Convention in Las Vegas, Nevada, the NOCIESA bylaws were adopted and a nine-member council was elected by the charter members in attendance. (See Appendix D for past council membership). Arrangements were made for staffing the association and in July of 1977, Dr. Walter G. Turner was hired by AASA to become the first Executive Director of the then NOCIESA and later the American Association of Educational Service Agencies (AAESA). Active founder Justus A. Prentice was elected to serve as the first president of the new association.

Two years later, at the May 1979 NOCIESA Council meeting, a motion was made, seconded and passed to submit the name change from NOCIESA to AAESA to the general membership for a vote. This recommendation was subsequently approved and NOCIESA became the American Association of Educational Service Agencies (AAESA). It was evident the American Association of Educational Service Agencies had been established and was prepared to move into the 1980’s.

AAESA in the 1980s

Throughout its organizational years and into the 1980s, AAESA continued to grow and provide programs for its membership and address the many issues facing the evolving and differing educational service agency structures. “Founding Father” Justus Prentice summed up these issues in 1976 when he wrote:

“Let’s face it: There are certain hazards we face today such as:

- Lack of understanding of educational service agencies.
- Lack of communication linkage among such agencies.
- Lack of a national focus.
- Lack of a resource agency to assist new state structures in their initial stage of development, and to facilitate necessary improvements in existing state structures for shared educational service agencies.
- Lack of appreciation for the capability of educational service agencies, by whatever name, to serve both local school districts and state purpose in provisions for equality of education opportunity and equity in financing public education.”

In those words, Justus Prentice framed the challenge for AAESA as it entered the new decade and it continues to be a major focal point today. It was Justus Prentice’s leadership and vision that caused AAESA to subsequently establish and name its most prestigious award in his honor, the Justus Prentice Award. Justus Prentice would be the first to receive this award when it was presented posthumously in 1989. (See Appendix E for award recipients.) The Justus Prentice Award continues to be presented annually to the individual making the most significant contributions to regional education agency programs. Eligible nominees include past or present educational service agency executives and staff.

In response to Justus Prentice’s challenge, the AAESA council established ongoing committees including federal programs and legislation, membership recruitment, profiling ESA programs, and information and research. A major emphasis was to establish programs specifically for ESAs and the initial effort was its pre-conference held in conjunction with the AASA Annual Convention. It was also an opportunity to hold the annual AAESA banquet and present the Justus Prentice Award. The second program to be developed was the original AAESA I Care Conference held in Washington, DC, to focus on the national AAESA legislative agenda for education. The third regular program was the AAESA Fall Seminar to provide executive professional development programs for ESA executives.

AAESA in the 1990s

The 1990s ushered in several new dimensions for AAESA as it established itself as a needed organization by its membership. It was a very challenging and opportunistic time, but it was also a critical time as many professional associations were eliminating programs because of declining membership and member participation. Those conditions caused AASA to reduce its level of staff support and services for AAESA at a time when AAESA had been extending itself through its formative years. This combination of factors placed AAESA in considerable financial debt to AASA at a time when there were increasing expectations and needs of AAESA’s membership. It was also the time when Dr. Walter Turner, AAESA’s first executive director, retired and the AAESA council selected Dr. Lee E. Christiansen, a then active AAESA council member and superintendent of Washington County Education Service District in Portland, Oregon, as Dr. Turner’s replacement. This was a critical time for AAESA as it had a limited number of state memberships (eight) and a heavy financial indebtedness to AASA. That set of conditions provided the basic challenge for AAESA’s exceptionally strong and committed council and staff to establish AAESA as a truly professional organization.

With this background, AAESA's council under the leadership of Dr. Christiansen, directed its efforts to become an independent professional organization by focusing its energies on membership recruitment and participation. Along with the membership recruitment program, the AAESA council identified five program areas: professional development, national legislative advocacy, research and publications, membership communication between and among members, and ESA advocacy and technical assistance that would become AAESA's hallmark.

The membership recruitment program was extremely successful. From 1992 to 1995, the statewide membership number grew dramatically from the original eight memberships to twenty-two. This gave AAESA the stability and support it needed to serve its members and provide the foundation for AAESA to redesign its activities and involve the council and its membership in its programs. Tremendous success followed, and by 1994 AAESA had paid off its AASA debt, was operating with a balanced budget, and had established its own contracted fiscal center at the ACES Regional Service Agency in New Haven, Connecticut. It was also at this time AAESA formally and legally separated from AASA by obtaining its own Articles of Incorporation and became a 501(c)(6) nonprofit corporation.

In addressing the professional development program, AAESA redesigned its annual Fall Seminar established in the 1980s which had a regular attendance of approximately 40 ESA executives. This event was to become AAESA's "centerpiece" program by opening attendance to all ESA staff and ESA board members with the program to be "delivered by ESA staff and board members for ESA staff and board members." The first such conference was held in 1991 and for the first time, attendance exceeded 100 in 1992, and has grown to over 1,200 attendees today (See Appendix E for AESA past and future annual conference sites).

In 1992, the AAESA banquet and awards ceremony was moved from the pre-conference at the AASA convention to the AAESA annual conference and it became a complete conference by and for educational service agencies. In 1993 the AAESA council established two more prestigious national awards. The Walter G. Turner Award was to be given annually to the individual providing outstanding support to regional education through legislative, community, governance, or staff service. The E. Robert Stephen Award was to be presented annually to an individual making outstanding regional education agency contributions through research and publications (See Appendix F for past award recipients). This conference has truly become an AAESA highlight and continues to provide many new and exciting opportunities for all ESAs. It was during this time the AAESA Pre-Con was expanded and AAESA reestablished itself as an integral part of the We Care Conference it had originally instituted (formerly called I Care Conference). By 2000, the We Care Conference was once again an AAESA-sponsored conference and the name was subsequently changed to "The Educators' Call to Action: Federal Advocacy Conference. The purpose of this conference was to work the "Hill" during the time that appropriations are being set and promote AESA's Legislative Agenda.

Further AAESA program expansion included national ESA legislation through the outstanding efforts of R. Bruce Hunter, AASA's legislative advocate and long-time supporter. Through Bruce Hunter's leadership, AAESA became a known entity and an active professional association. ESAs became an important part of the national educational legislative agenda. To enhance the governmental relations activities, the executive council established a strategic initiative on federal advocacy as part of its first strategic plan in 1999. Dr. Joe Marinelli from Wayne-Finger Lakes BOCES (NY) and Dr. Joe Lagana from Allegheny Intermediate Unit (PA) co-chaired a task force to develop the initiative's structure. It included establishing a governmental relations committee, operating principles for the committee, a set of beliefs with respect to public policies affecting ESAs, an electronic member network and call to action procedures, and hiring of a governmental relations specialist. Each year the legislative committee meets in January to develop the AESA Legislative Agenda which is implemented throughout the year.

In another dimension, in 1992 AAESA moved to enhance its communications, publications, and research programs. To further increase communication with membership, AAESA established regular distribution of its bi-monthly NEWSLETTER and its off-month BULLETIN. By 2000 the newsletter and the bulletin were combined into a monthly publication called *AESA News*.

In publications, E. Robert Stephens and Walter G. Turner authored AAESA's *Approaching the Next Millennium: Education Service Agencies in the 1990s*. This was soon followed by AAESA's publication, *Exploding the Myths, Another Round in the Education Debate*, by Dr. Joe Schneider and Dr. Paul Houston. In 1995, AAESA began the outstanding annual journal of research and opinion about educational service agencies entitled, *Perspectives, A Journal of Research and Opinion About Educational Service Agencies*, under the leadership of past council member/president, Dr. William Keane. AAESA was truly maturing as an independent professional association for the educational service agencies it was designed to serve.

In 1995, Dr. Christiansen retired as executive director but remained part-time as director of membership to continue to expand and provide member services. Bruce Hunter, AAESA's legislative advocate, became the AESA executive director. In 1996, under Bruce Hunter's leadership, the council secured federal legislation clarifying and expanding the ESA definition in the Individuals with Disabilities Education Act (IDEA). 1996 was also the year when AAESA entered into its first formal business partnership with Great American Life Insurance Company. By 2016, AESA's partnerships had grown to include eleven businesses that provide financial support and their respective services to AESA members.

In 1997, Dr. Brian Talbott, former AAESA council member and superintendent at Educational Service District 101 in Spokane, Washington, became the executive director. During this year AAESA's mission statement and strategic initiatives were formally adopted. Both were reviewed yearly and modified to meet current needs.

The current AESA mission, established in 1999, is to support and strengthen regional educational service agencies by:

- Serving as a national voice for educational service agencies;
- Providing professional growth opportunities, technical assistance, advocacy and research;
- Helping member agencies promote, distribute, and leverage their knowledge, products, and services; and
- Assisting in the establishment of educational service agencies.

AESA's first Strategic Plan was adopted in 1997 and modified in 2001 to read:

Objective 1: Completion of our present strategic initiatives:

Initiative #1: We will strengthen our ability to affect education policy through appropriate and effective governmental relations activities.

Initiative #2: We will organize and position the organization to meet the needs of a growing and increasingly diverse membership.

Initiative #3: We will develop relationships and partnerships that promote the vision and agenda of AESA.

Objective 2: Expansion of our membership to include every state that has educational service agencies.

Objective 3: Formation of a planning process that will assure our continued growth into the foreseeable future.

Objective 4: Expansion of our partnerships with educational service agencies in other countries.

Objective 5: Continuing the growth of our newly formed AESA Foundation. In 1998, the council conducted its first detailed national data survey. AESA now has a database that provides critical data about AESA to Congress, businesses, other interested parties and its membership. 1998 was also a watershed year as the Hamilton County ESC in Ohio hosted the AESA Annual Conference in Phoenix, Arizona. Attendance for this conference exceeded 1,000 for the first time. In 2001, Michigan's Wayne RESA hosted the conference in Las Vegas with over 1,200 attendees. This was a remarkable accomplishment considering there were only 120 attendees in 1992. AESA was fast becoming a recognized leader among national associations.

From 1997 to 2001, AESA became a leader in technology. ESAs across the country provide E-Rate leadership, coordination, implementation and training while AESA was represented on the Universal Services Administrative Company Corporate Board (USAC) by Brian Talbott.

To help enhance communications, AESA established a national website. Prior to 1997, the AAESA website was housed at Area Cooperative Education Services Center (ACES) in New Haven, Connecticut. The initial site was set up as an informational site and maintained voluntarily by ACES staff. In 1997, the council decided to expand the site and contracted with Geannie Wells as AESA webmaster. It was also determined by the council and ACES that the site should be moved to Central Susquehanna Intermediate Unit #1, CSIU, in Lewisburg,

Pennsylvania. Under the direction of executive director Bob Witten, his technology director Geoff Craven, and AESA webmaster Geannie Wells, a new interactive website was designed. In 1999, when AAESA changed its name to AESA, the official website became www.aesa.us. It was also at this time that its business partner WebED donated their graphics department to AESA so that a new logo could be designed for the website. The council liked the new logo so much that it was adopted as the official AESA logo.

The AESA website was enhanced by adding the ability to link every ESA in the country to the national website as well as linking to our sister organization EdVenture in the Netherlands. There also was a customized legislative alert system as well as list-serves for members, the council, and international committees. With these linkages, the AESA website became a major communication tool for the association.

In 1998/1999 the council undertook an extensive review as to whether AESA should create a foundation. Moore and Associates were contracted to complete this study. After interviewing members, business partners, and other individuals who had knowledge about ESAs, it was determined that AESA should establish a foundation as a 501(c)(3) non-profit corporation. Ron Fielder was chosen by the council to chair the AESA Foundation for the Future campaign. The Foundation is supported by corporate pledges as well as individual and agency commitments. The AESA Foundation has an ongoing endowment benefiting member agencies by promoting and expanding professional development, legislative advocacy, research, publications, networking, public/private partnerships, technology, and leadership for ESAs across the country. (See Appendix G for AESA Foundation board members).

At the annual meeting in December 1999, AESA voted to drop “American” from its name and became the Association of Educational Service Agencies (AESA). AESA also signed its first international agreement with the educational service agencies (EdVenture, previously known as WPRO) in the Netherlands. While attending a conference in the Netherlands, ESA representatives from Scotland and Belgium discussed establishing relationships with AESA. Additional international discussions took place with Hungary, United Kingdom, Finland, Switzerland, and Norway as educational service agencies prosper in other parts of the world. An International ESA Summer CEO Conference was planned for July 2002 in Maastricht, the Netherlands.

In 1999, AESA held its first Summer CEO Conference for ESA Chief Executive Officers. This conference was held in La Crosse, Wisconsin, and was sponsored by Don Stevens and his management team at Cooperative Education Service Agency 5 in Portage, Wisconsin. Because of the success of the conference the AESA council made the Summer CEO Conference for ESA Chief Executive Officers an annual event.

With the continuing commitment and participation of the council and numerous member volunteers, AESA was positioned to provide 21st Century leadership to its members. At the same time, ESAs across the country have become an integral part of the education fabric of this nation. This is an amazing history for a truly young professional organization. Success has been built through fantastic, dedicated, hardworking individuals, many of whom were present at the annual conference in Atlanta, Georgia, where AESA celebrated its 25th anniversary. One can only

wonder how AESA will grow and continue its outstanding service to public education throughout the rest of this new millennium.

Part II: AESA Coming of Age in the New Millennium (2001-2016)

By 2001 AESA was quickly becoming a recognized educational force at the national level. ESA members were becoming a critical part of the education process within the states they served while supporting the national efforts led by AESA. The following is an analysis of how AESA and its members moved forward and impacted the fabric of our education system.

In 2001, AESA recognized that with the added responsibilities and growth in its membership it needed additional support to meet the needs of the Association. To this end, AESA hired Kari Arfstrom as its first Associate Director, who was with the association from 2001 to 2007.

From 1994 to 2002 ACES in North Haven Connecticut handled the finances of AESA under the direction of their Executive Director, Peter Young. On July 1, 2002, following his retirement from ACES, Peter Young accepted the position of Chief Financial Officer of AESA.

Federal Relations

By 2001 federal relations and advocacy had become so important to AESA and its members that it became the first standing committee of AESA. The board authorized the Federal Relations Committee to consist of one member from each state. ESAs were growing in importance during this period and the Committee worked hard to expand the definition of Educational Service Agencies in The No Child Left Behind Act (NCLB) (P.L. 107-110), which was passed and signed by President George W. Bush in 2001. This Act is the largest federal aid program targeting K-12 education. Critical in NCLB was the expansion of the 1994 definition of local education agencies which defined an educational service agency as:

A regional public multi-service agency authorized by state statute to develop, manage and provide services or programs to local educational agencies (Goals 2000: Educate America Act of 1994).

NCLB retained the 1994 definition of a local education agency but revised the definition of a local education agency to include three additional entities that could qualify for education status in implementing provisions of the Act: education agencies, consortia of education service agencies and state education agencies.

Following the passage of NCLB, the AESA Governmental Relations Committee and Council wrote a white paper on ESAs at the Summer CEO Conference in Seattle, Washington in July of 2001. This paper defined a new era for AESA and what would become its expanded relationship with the United States Department of Education (USED). When the paper was presented to Secretary of Education Rod Paige, he responded by appointing Dr. Susan Sclafani, Counselor to the Secretary, as the Department's liaison to AESA reflecting the growing stature of AESA at the national level.

Critical to the role of ESAs was the support that Secretary Paige and Counselor Sclafani gave to AESA and ESAs. In a letter sent to each State Department of Education, dated April 18, 2003, Secretary Paige requested each state:

- Consider providing professional development and technical assistance through education service agencies.
- Where education service agencies do not exist, the state is to consider providing these through other cooperative agreements such as consortia of local education agencies.

It was during this same period that Dr. E. Robert Stephens and AESA met with the National Center for Education Statistics (NCES) to explain that the way NCES was compiling data for ESAs included many entities that were not appropriately classified as ESAs. AESA was concerned that NCES listed over 2000 entities as ESAs when in fact less than 600 entities were actually ESAs. This classification error opened the door for other entities to be eligible for Federal funding because they were categorized as an ESA. In 2004, working with NCES and USED, AESA was able to receive a Federal grant called the ESA Personnel Information Project (EPIP). The grant provided funding for AESA to work with its membership to identify the actual number of ESAs and develop a communication system that would allow USED to communicate directly with ESAs around the country. The project had a number of goals which included:

- the development of software infrastructure to promote easy broadcast communications from and between USED, AESA and ESAs,
- the collection of data from ESAs around the country to populate the software infrastructure,
- the use of software to communicate with ESA personnel, and
- the collection of data to enable NCES to improve the quality of its ESA database.

By 2005, AESA had successfully improved communication between USED and ESAs as well as significantly reducing the number of entities erroneously classified as ESAs.

During this time AESA also sought legal interpretations around the issue of supplemental services and career and technical legislation, in particular NCLB. In a 2005 memorandum, attorneys Marie F. Sneed and Jennifer Stillerman of Hogan and Hartson responded to the question of whether Educational Service Agencies could be Supplemental Education Services (SES) Providers. Their response to NCLB regulations stated, “ESAs may provide supplemental educational services so long as they receive approval from their state based on their state’s published criteria.” The response went on to say, “As the DOEs and SES Guidance indicates, ‘any public or private (non-profit or for-profit) entity that meets the State’s criteria for approval’ may be a provider of supplemental educational services.”

In 2006, further clarification regarding the eligibility of ESAs was expanded under the Carl D. Perkins Career and Technical Education Improvement Act of 2006. In a memorandum to AESA attorneys Maree Sneed and Ambia Harper of Hogan and Hartson again concluded:

ESAs qualify as eligible institutions and eligible recipients under the Perkins Act both in their capacity as educational service agencies and as LEAs. Therefore, they may qualify for grants under several provisions of the Act, including the sections on state leadership activities, local provisions for secondary and post-secondary programs and funding for tech prep programs.

This level of Federal support to AESA members would not have happened without the commitment of the Federal Relations Committee, the hard work of individual ESA members, and the continued support of our ongoing advocacy contract with AASA. This support was led through the nineties and into the new millennium by the commitment of Bruce Hunter, Associate Executive Director, Advocacy, Policy and Communications. Assisting Bruce with this effort were two critical AASA advocacy staff members, Mary Kusler and Noelle Ellerson. With the retirement of Bruce Hunter in the summer of 2013, Noelle Ellerson, Associate Executive Director, Policy and Advocacy, and her team have continued to provide the critical ongoing federal advocacy support to AESA.

This level of Federal support opened a new chapter for ESAs. ESAs could now expand their role in service development to include the provision of supplemental services, career and technical education, professional development, technical assistance, special needs, as well as the emerging and important area of technology.

Complementing the NCLB Act was a previous bill, the Telecommunications Act of 1996. This bill created the Universal Services Administrative Company (USAC) which was established to administer the High Cost Low Income, Rural Health Care and the Schools and Libraries Program which became known as the E-Rate Program. E-Rate initially provided \$2.25 billion of support to schools and libraries. By 2016 the program's fund had been increased to \$3.9 billion. The program provides discounts to help schools and libraries throughout the nation by assisting them to secure affordable access to high speed broadband including telecommunications, internet access, basic maintenance and internal connections. The E-rate program serves public and private schools across the nation, as well as public libraries. It was important that ESAs be written into the rules and regulations given they also provide direct services to students through cooperatives and direct services. Many ESAs also serve as the technology hubs for the school districts and libraries in their region.

AESA Executive Director Brian Talbott was named to serve as one of three education representatives on the USAC Board when it was formed in 1996. USAC continues to insure that ESAs, school districts and libraries remain eligible and active recipients of these funds. The overall effect of the No Child Left Behind Act was that the responsibilities of ESAs expanded and the eligibility of ESAs to provide services to their constituent districts was clearly defined. The Telecommunications Act and the Perkins Career and Technical Education Act are specific examples of how the expanded definition in NCLB provided an avenue for ESAs to increase their service delivery capacity.

Headquarters

During the early part of our history, AESA's offices were located in the Rosslyn neighborhood of Arlington, VA, where we leased office space from the American Association of School

Administrators (AASA). In 2002, AASA sold the building and moved to leased space also in Arlington, VA. AESA moved into the new location and continued its close working relationship with AASA. By 2011 AESA developed into a virtual association with its employees and sub-contractors using the support of AASA primarily for governmental relations and meeting space. When the AASA building in Arlington was sold in 2011, AESA determined it would operate virtually and contract specifically for governmental relations services from AASA. AASA continued to support AESA by providing governmental relations services and allowing us to continue to utilize their new facilities in Alexandria, VA for meetings when AESA staff or members were working in the DC area.

Governance and Finance

Another major change came about in 2002 when the AESA Council and membership increased the council representation from three regions (East, Central and West) to four. By adding a Southern Region, AESA was able to meet the needs and dramatic growth of ESAs throughout the country. In 1997 there were 448 ESAs in AESA and by 2002 AESA had grown to over 530 members. This change in governance added three representatives and the council increased from nine to twelve members. Each Region was given a bye in the election of new council members every fourth year.

It was also during 2002 that AESA held their council meeting and attended an International meeting of ESAs in Europe. AESA was hosted by Dr. Ruud Gorter, Executive Director of Edventure, our ESA counterpart in the Netherlands. The Council attended several days of international meetings with our European peers. After the conference concluded we were divided into teams so we could make visitations to the ESAs in the Netherlands. AESA continues to offer opportunities for other countries to participate in our conferences and share their expertise.

By 2003 the Council made the decision to expand the financial stability of AESA. Rather than relying solely on membership dues and conference revenues AESA expanded business partnerships. This concept became the three-legged stool that initially brought stability and sustainability to the organization. It was also during this time that the Business Partnership Committee and the Membership Services Committee became standing AESA committees. These were then followed by the Research and Development Committee.

In 2004 the AESA Aspiring ESA Administrators Program was launched and the name was changed to the Executives in Residence Program (EIR). This program began as an idea of AESA Associate Director Kari Arfstrom. It soon took root and was established by the AESA Council under the leadership of Council Member Twyla Barnes, Washington. The goal of the program was to create future national leaders. Twyla did an exceptional job as the first program director of the Executives in Residence Program. Upon her retirement in 2013 the program was turned over to EIR Program Coordinator, Joe Crozier (Iowa). Joe has continued to build and expand this critical training program for future AESA leaders. The program is a performance-based opportunity that:

- Includes a strong mentor component by CEOs of the council and host ESAs
- Provides access to a variety of leadership experiences
- Works in a cohort model providing national networking and communication.

As of 2016, this year-long program of professional development for future leaders has served fifty-five future ESA leaders. Cliff Carmody (Minnesota), who was a participant in the first EIR class, will replace Joe Crozier as our Association's EIR Coordinator in 2017.

It was during the first ten years of the new century that the council concentrated on stability and the utilization of technology to enable AESA to better and more cost-effectively serve its members. This meant completing a Public Relations Study which led to a redesigned expanded searchable website. The AESA directory was put online and our technology hub was moved from AASA to the Central Susquehanna Intermediate Unit in Milton, Pennsylvania.

In 2005, Dr. E. Stephens and Dr. William G. Keane, wrote the first book about ESAs. The Educational Service Agency: American Education's Invisible Partner, became the authoritative book regarding the evolution, impact, contributions and future of ESAs.

By 2007 the Research and Development Committee, with funding help from the AESA Foundation, published two studies:

- The role of Educational Service Agencies in supporting Alternative Teacher Certification Programs, Phase I and Phase II (Mid-Continent Research for Educational Learning (McREL).
- Educational Service Agency Accountability and Accreditation: Is a National System Needed? (Learning Point Associates)

Each of these studies added to the growing base of knowledge and research about ESAs and would eventually lead to programs like the AESA Benchmarking Project and Statewide accountability systems.

In 2009, the AESA Executive Council established the Dr. Brian L. Talbott award. This award acknowledges an individual or agency for contributions in the area of technological innovation and support to local districts and educational service agencies (See Appendix F for past award recipients).

Partnerships, Networks, and Conferences

During this same period AESA was developing a much closer relationship with other associations that also worked with ESAs and wanted to develop working relationships with AESA. In 2007, AESA hired Dick Moody as Director of Business Services to assist with this effort and the expansion of business partnerships. In 2008–09 AESA formed an alliance with the Association of Educational Purchasing Agencies (AEPA) and took a seat on the AEPA Board. In addition, a working agreement between AESA and the National Association of Media and Technology (NAMTC) was established. In 2009 both AEPA and NAMTC joined AESA at its Annual Conference in Austin, Texas. The NAMTC Pre-Conference was attended by both AESA and NAMTC members. By working together and leveraging each other's expertise all three organizations became stronger. These relationships grew and in 2016 AESA manages the administrative contract for the Executive Director of AEPA and NAMTC continues to work with

AESA by publishing the NAMTC/AESA Big Deal Technology Newsletter, a bi-weekly electronic publication.

During 2007 AESA shifted its conference oversight and support from a subcontract with AASA to Dyanne Hughes of DLH & Associates. This change in conference support gave AESA more direct control over the process and with Dyanne and her team we reduced overall conference costs which in turn meant lower costs for the conference attendees.

Another significant development during the first part of this century was the advent of shared services. With shared services, ESAs leveraged and pooled resources between themselves and the districts within their regions. These shared services included, but were not limited to: finance, human resource management, purchasing, legal services, data warehousing, instructional management, technology, school improvement, public relations, transportation, online learning, custodial and maintenance services, and security. Shared services led to a definite expansion of high quality services that could be delivered more cost-effectively from the ESA level. The success of shared services led many states to take the next natural step of building statewide networks.

The networking movement meant that ESAs around the country were coming together to leverage their resources so that individual ESAs could deliver high quality programs in a cost-effective manner. Dr. Susan Leddick of Profound Knowledge Resources led the networking effort. ESAs learned how to work together and leverage resources so that every ESA within a state could become stronger. Susan had worked directly with the AESA leadership in positioning our organization to meet current and future needs. A natural extension was for her to assist states in building statewide networks. States like Iowa, Ohio, Washington, Wisconsin and Pennsylvania used her services while other states like California, Colorado, Oregon, and New York proceeded on their own to develop internal structures for meeting their state-specific networking needs. The effect of shared services and statewide networks has gone beyond merely working together within an ESA region and/or state. ESA networking has led to the building of improved technology consortiums, online learning, purchasing, shared financial services, data centers, school improvement, and of course shared professional development. As these networks grow the ability to deliver cost-effective quality services will continue to increase.

Complementing the growth of shared services and statewide networks during the past fifteen years is the growth and contributions of State Leaders and State Association Executive Directors. This combination of leadership on behalf of ESAs has played an important role in expanding the reach of AESA while building strong statewide associations.

2010 was a turning point for AESA. Dr. Brian Talbott, who had been the Executive Director since 1997, announced his retirement leading to a transition period and the selection of Lee Warne as the 2011 AESA Executive Director.

During the Council's planning session in May of 2010, the AESA Council recognized that with all the successes and growth that AESA has enjoyed, it needed to continue to address size, organization, and direction. Given the economic downturn, AESA recognized the need to look for new opportunities to raise revenue in order to continue to expand its role as a premier

educational association. As a result of a planning session led by Susan Leddick, the council adopted the following goals:

- Financial Stability
- Transition of Leadership
- Expansion of AESA Influence at the State and National Levels
- Technology and Global Competitiveness

The Council, while working on all four goals, put emphasis on the transition of leadership and worked with Lee Warne, Brian Talbott, and Peter Young, AESA CFO, to insure a smooth transition when Lee Warne started on July 1, 2011.

New Leadership

Under the leadership of Executive Director, Lee Warne, a number of steps were taken to not only move AESA forward, but to position AESA for future growth. In the spring of 2012 the Council and Executive Director revised AESA's goals to include:

- Leadership Succession to Leadership Success
- Advancing AESA and ESCs through Enhanced Governmental Relations Efforts
- Stabilize Funding
- Expanding and Enhancing the AESA Digital Footprint

These goals included adding fiscal sustainability, maximizing the use of specific sub-contractors, growing business partnerships while increasing the use of technology and introducing new ways to meet the needs of the membership.

One of the first initiatives undertaken was to stabilize AESA funding by adding a fourth leg to the existing three-legged financial stool that already included membership dues, conference fees, and business memberships. The Council added a fourth funding stream by developing specific membership programs in concert with ESAs. These new member products included such programs as the Student Loan Forgiveness Program, Member Benefit Services and Best Speakers Program. These and additional programs will continue to add to AESA's financial stability.

The ESA Marketplace was introduced in 2007 as an opportunity for ESAs to share their products. In 2015 it was reenergized as the go-to place for member ESAs to share their successful programs and services. The major goal of the ESA Marketplace today is to promote products and services developed by and for ESAs.

In 2012, AESA began developing the AESA Organizational Benchmarking Project. This voluntary ESA initiative project was developed by ESA leaders in a partnership between AESA the AESA Foundation, several state ESA associations and an AESA Business Partner. By 2013 this metrics project and benchmarking survey of ESAs was offered as a value-added service to its member organizations. The goals were to:

- Develop a rich ESA data source,

- Provide an opportunity for ESAs to benchmark against like organizations,
- Identify ESA best practices,
- Improve ESA organizational outcomes, and
- Drive increased student improvement and client services.

This project has the potential to not only meet these goals, but also further clarify the EPIP Grant of 2004, especially as it relates to refining the NCES database and the identification of ESAs as it relates to Federal funding eligibility.

During this same time the Council determined they could expand the effectiveness of the Research and Development Committee, Business Relations Committee and the Global Education Ad Hoc Committee by operating as a Committee of the Whole. It was decided that the Governmental Relations Committee should remain a standing committee.

In 2013, AESA undertook the goal of working with Agency Administrator Joan Wade and the team at CESA 6 in Oshkosh, WI to relocate our technology infrastructure to their agency. This included CESA 6 hosting the AESA website and email system. By 2015 the conference registration software was also provided by CESA 6.

Communication and Outreach

In 2015 CESA 6 conducted a full communication audit for AESA. In summary, the results confirmed the importance of the AESA Online News, as well as legislative and legal information. It was also understood that networking and sharing among ESAs is extremely important to our members. The study recommended that AESA use conferences for creating and expanding networking opportunities and utilize push technologies for meeting the growing needs of the Association and its members.

It should be noted that in 2012, AESA introduced its first mobile conference application for our Annual Conference attendees in Tampa, Florida. This application was well-received and is now an important aspect of the national conferences.

To help improve communication between AESA members and business partners, AESA subcontracted in 2015 with John Fitzgerald as its online Education Reporter. John interviews and writes articles that inform the membership about what is happening with and for ESAs and business partners.

Another change occurred in 2013, when Dr. Bill Keane retired as the Editor of *Perspectives*. Brian Talbott became the editor and Bill remained on the Editorial Board to offer support and assistance with the transition. Dr. Keane made extensive contributions both in starting *Perspectives* and serving as its Editor from 1995 to 2013. The hard work of the past contributing authors and the editorial board provided significant research and expanded the opportunities for ESAs throughout the country to build a repository of research and practice.

In 2013 *Perspectives* evolved from a hard copy journal to an online publication. This was a cost savings move that also allowed our readers the ability to access the articles immediately. Under this model, as soon as the editorial board approved an article it was published electronically to

members and other interested individuals and entities. At the end of each year of the articles written during a given year are compiled in a single online publication which is available on the AESA website for our readers. By moving to an electronic format, *Perspectives* has doubled its reach to over 14,000 readers. This growth could not have happened without the support of the Council, the authors who wrote the articles, and the dedication of the *Perspectives* Editorial Board.

Brian Talbott will be retiring as the Editor at the end of 2016. Council member Dr. Scott Menzel, Superintendent of Washtenaw ISD in Ann Arbor, MI has been appointed by the AESA Council as the new Editor of *Perspectives*.

AESA Foundation

One cannot review the history of AESA without addressing and updating the contributions and support of the AESA Foundation. Ron Fielder helped make the AESA Foundation a reality, and served as Chair from 2002-2010. Ron was followed by Virginia Seccombe, Twyla Barnes and Dave Distel who took over as Foundation Chair in 2013.

Through the contributions and the support of the AESA staff, council members, ESA Agencies, Business Members, and the AESA Foundation Board members have allowed AESA to expand services and provide critical support to the organization and its membership. In 2011, the Foundation Bylaws were changed to return the Foundation to a Type 1 Foundation organization with the sole purpose of supporting AESA and entrusting the election of Foundation Board members to the AESA Council.

As of July 2016, the AESA Foundation had raised \$704,268 and distributed \$400,245 in support of special projects such as the AESA National Conference, conference registration software, research projects, and the AESA Bench Marking Project. The AESA Foundation has managed the AESA Summer Leadership Conferences since 2004 and the auctions at the AESA National Conference since 2005. The success of the auctions is due to the continued management commitment of Dave Distel, Karen Muse, and other staff members from Hamilton County Education Service Center in Cincinnati, OH. In 2011 they added a live auction to the already established silent auction. Dr. Mike Cook, Executive Director, ESSDACK, Hutchinson, KS, continues to serve as AESA's outstanding auctioneer.

Another major contributor to the AESA Foundation has been Dr. Susan Leddick. In addition to being an active AESA Foundation board member, Susan has participated and helped plan our Foundation-sponsored CEO Summer Leadership Conferences.

It is also important to recognize the Foundation's history of continued support of the AESA National Conference. This support affects every ESA as the Foundation funding helps offset the cost of conference meals. This is critical because AESA is one of the few remaining education associations that continue to provide meals during its annual conferences while keeping the conference registration costs much lower than other national education conferences.

Another significant project of the AESA Foundation occurred in 2009 when it established the E. R. Stephens Digital Library. This library on the AESA website at www.aesa.us was established

to provide a rich history of AESA from its early organizational years in the 1970s to the present time. This ongoing archival project includes AESA operations, conference materials, publications research, and other major resources that promote ESAs and public education. In the research area of the library is a treasure chest of research that has been compiled by Dr. Stephens and others from 1969 to present.

Transition During our 40th Anniversary Year

John Bass was appointed as Chief Operating Officer (COO) in April of 2016 and will replace Peter Young at the end of 2016. Geannie Wells, who has been the AESA Web Master since 1997 will also retire at the end of 2016. Geannie has done an outstanding job as AESA's sole Web Master. Through her hard work and commitment, AESA has one of the most user-friendly association websites.

During the summer of 2016 the smooth transition between Lee Warne and Joan Wade, our newest AESA Executive Director, took place. This signified a new era and Joan and the Council set a goal of redesigning AESA to meet future needs. In addition, a new logo, colors, and website will be introduced at the fall Annual Conference in Savannah, Georgia, November 30 – December 3, 2016.

During the summer and fall of 2016, AESA, under the leadership of Executive Director Dr. Joan Wade and the AESA council, contracted with Dr. Susan Leddick of PKR, Inc. The goal was to lead a design process that would engage stakeholders, envision a bold next generation of the association's development, and lay plans to enact the first five steps toward the next generation of AESA. These steps include:

1. Align national and state programs and activities to an annual association theme.
 - Establish the annual theme midway through the previous year.
 - Use the theme as a strategy for aligning programs and activities nationally and in the state network.
 - Organize *Perspectives* articles so that they build on the annual theme and lead up to the Annual Conference with relevant information.
 - Publish a themed book list to be read by study groups across the nation.
 - Align related activities such as issue identification sessions at the annual conference and the January legislative meeting.
2. Design and launch a national advocacy campaign. Include state networks.
 - Work with the state networks to increase impact.
 - Establish a model for conducting such campaigns.
 - Develop and distribute useful toolkits to support future advocacy campaigns.
3. Initiate governance reform to assure that the AESA Council and member agencies engage and reflect diversity.
 - Define "diversity" broadly.
 - Generate multiple strategies to be used at association and local levels.

4. Establish affinity groups and a process for documenting their learning and accomplishments.
 - Define “affinity” to include both geographic proximity and similar interests.
 - Consider forming a group specifically to develop a consensus definition of the preferred contemporary learning experience for students.
 - Encourage experimentation with different kinds of groups, including “fire pit” configurations based on issues and leading to mutual support among ESA colleagues.
 - Develop and test a variety of ways to document, store, and share affinity groups’ learning and accomplishments.

5. Formalize the network of state directors.
 - Begin with the first national meeting to be held in Iowa during October, 2016.
 - Continue to develop ways for the national association staff and the state directors to work together to market and brand ESAs, provide relevant professional development, strengthen advocacy in the states and nationally, establish and strengthen state ESA networks and individual agencies, provide technical assistance, and promote formation of meaningful affinity groups within and across the states.

These five steps will serve as the basis for the future of AESA. These outcomes will most certainly serve as the next chapter in our AESA history.

As a past Executive Director, I want to thank now past-Executive Director, Lee Warne for all of his contributions in moving AESA forward. I also want to personally recognize the contributions of Peter Young who has given so much to AESA. Peter is the only person still serving AESA who was sitting at the table during the formative years of AESA in the mid-seventies. He not only personally witnessed the formation and growth of the organization, but has added his touch and expertise throughout our history as a member, council member, CFO, COO, and in-house historian. Without his expertise, AESA wouldn’t be where it is today. Peter will be retiring at the end of this year but his legacy lives on through AESA.

When AESA’s Annual Conference takes place in 2026, the year of our Fiftieth Anniversary, Executive Director, Joan Wade and our elected Council members will have joined with our AESA membership to take AESA to levels higher than any of us could have envisioned. I’m personally looking forward to our future as each of you contributes your time and effort to make AESA all it can be.

Appendix A
**Organizational Activities for the Formation of the National Organization of County,
Intermediate and Educational Service Agencies (NOCIESA)**

October 1975 R/REA Convention – San Antonio, TX: Initial meeting to determine interest in forming a national organization.

December 1975 Ad hoc Committee Meeting – Chicago, IL: Decision to proceed within AASA and seek proposal grants

February 1976 AASA National Convention – Atlantic City: One day meeting to present facts and figures to prospective members. Initial involvement started with NIE.

April/May 1976 Four Regional Conferences (San Francisco, CA, Denver, CO, Detroit, MI, College Park, MD): Identified needs of regional agencies and formulated programs.

June 1976 Ad Hoc Committee Meeting – Denver, CO: wrote bylaws and negotiated with AASA for contract.

July-December 1976 Produced brochures for charter memberships and established charter membership drive.

October 1976 R/REA Convention – Albany, NY: Ad Hoc Council meeting to finalize plan of membership, bylaws and plan first meeting of charter members at the AASA Convention.

February 1977 Organizational Meeting AASA Convention in Las Vegas, NV: Approved bylaws, elected Council members, issued charter members (82) with 120 people in attendance, supported organization and employed Associate Director.

March 1977 First Council Meeting – Chicago, IL: Finalized the organization of the Council and the contract with AASA, established working committees and started the process to employ Secretary (AASA Associate Director).

May 1977 Council Meeting – St. Louis, MO: Submitted recommendation to AASA for an Executive Secretary with employment to begin July 1977.

Appendix B
Charter members of the National Organization of County, Intermediate, and
Educational Service Agencies (AESAs Parent Organization)

CALIFORNIA

Fresno County Office of Education, Fresno, CA
Imperial County Office of Education, El Centro, CA
Mendocino County Office of Education, Ukiah, CA
Santa Clara County Office of Education, San Jose, CA
Shasta County Office of Education, Redding, CA
Yolo County Office of Education, Woodland, CA

COLORADO

East Central BOCES, Limon, CO
Northern Colorado BOCES, Longmont, CO
Pikes Peak BOCES, Colorado Springs, CO
Southeast Metropolitan BOCES, Englewood, CO

CONNECTICUT

Area Cooperative Educational Services, New Haven, CT

ILLINOIS

Lake County Educational Service Region, Waukegan, IL
McLean County Educational Service Region, Bloomington, IL
Montgomery County Educational Service Region, Hillsboro, IL
Will County Educational Service Region, Joliet, IL

IOWA

Arrowhead AEA, Fort Dodge, IA
Mississippi Bend AEA 9, Davenport, IA
Area Education Agency 4, Sioux Center, IA
Area Education Agency 13, Council Bluffs, IA
Area Education Agency 15, Ottumwa, IA
Area Education Agency 16, Fort Madison, IA

MAINE

Region 8 Coop Board for Vocational Education, Rockland, Maine

MASSACHUSETTS

Merrimack Education Center, Chelmsford, MA

MICHIGAN

Calhoun Intermediate School District, Marshall, MI
Copper County Intermediate School District, Hancock, MI
Delta-Schoolcraft Intermediate School District, Escanaba, MI
Kent Intermediate School District, Grand Rapids, MI
Macomb Intermediate School District, Mount Clemens MI
Mason Intermediate School District, Ludington, MI
Muskegon Intermediate School District, Muskegon, MI
Wayne County Intermediate School District, Wayne, MI

NEBRASKA

Educational Service Unit #5, Beatrice, NE
Educational Service Unit #13, Scottsbluff, NE

NEW HAMPSHIRE

SE Regional ESC, Derry, New Hampshire

NEW YORK

Broome-Delaware-Tioga Counties BOCES, Binghamton, NY
Clinton-Essex-Warren-Washington Counties BOCES, Plattsburgh, NY
Delaware-Chanango-Madison-Otsego Counties BOCES, Norwich, NY
Erie 1 County BOCES, Lancaster, NY
Genesee-Wyoming Counties BOCES, Batavia, NY
Madison-Oneida Counties BOCES, Verona, NY
Monroe 2-Orleans Counties BOCES, Spencerport, NY
Onondaga-Madison Counties BOCES, Syracuse, NY
Rockland County BOCES, West Nyack, NY
Schuyler-Chemung-Tioga Counties BOCES, Elmira, NY
Steuben-Allegany Counties BOCES, Bath, NY
Sullivan County BOCES, Liberty, NY
Ulster County BOCES, New Paltz, NY

OHIO

Columbiana County Board of Education, Lisbon, OH
Cuyahoga County Board of Education, Bedford Heights, OH
Mahoning County Board of Education, Youngstown, OH
Stark County Department of Education, Louisville, OH
Tuscarawas County Board of Education, New Philadelphia, OH
Van Wert County Board of Education, VanWert, OH

OREGON

Clackamas County Intermediate School District, Marylhurst, OR
Douglas County Intermediate School District, Roseburg, OR
Malheur County Intermediate School District, Vale, OR
Multnomah County Intermediate School District, Portland, OR
Yamhill County Intermediate School District, McMinnville, OR

PENNSYLVANIA

Allegheny County Intermediate Unit 3, Pittsburgh, PA
Appalachia County Intermediate Unit 8, Ebensburg, PA
Berks County Intermediate Unit 14, Leesport, PA
Bucks County Intermediate Unit 22, Doylestown, PA
Carbon-Lehigh County Intermediate Unit 21, Schnecksville, PA
Colonial Northampton County Intermediate Unit 20, Nazareth, PA
Fayette-Greene Washington County Intermediate Unit 1, California, PA
Lancaster-Lebanon County Intermediate Unit 13, East Petersburg, PA
Lincoln County Intermediate Unit 12, New Oxford, PA
Midwestern County Intermediate Unit IV, Grove City, PA
Montgomery County Intermediate Unit 23, Blue Bell, PA
Northwest Tri-County Intermediate Unit 5, Edinboro, PA

TEXAS

Education Service Center, Region VI, Huntsville, TX
Education Service Center, Region XII, Waco, TX
Education Service Center, Region XIV, Abilene, TX
Region XIX Education Service Center, El Paso, TX

WASHINGTON

Educational Service District 101, Spokane, WA
Educational Service District 108, Bellingham, WA
Educational Service District 112, Vancouver, WA
Educational Service District 114, Port Townsend, WA
Educational Service District 123, Walla Walla, WA
Educational Service District 171, Wenatchee, WA

WEST VIRGINIA

North Central Regional Educational Service Agency, Morgantown, WV

WISCONSIN

Cooperative Educational Service Agency 13, Waupun, WI

Appendix C
Bylaws of the Association of
Educational Service Agencies Incorporated
Amended 2008

Article 1. Statement of Purpose and Organization

The Association of Educational Service Agencies Inc. (AESA) is hereby constituted for the purpose of creating, developing, and promoting a better understanding of and support for the regional system of education through educational service agencies (ESAs). In order to establish the important role of ESAs, AESA shall establish and promote programs and services that are designed to assist ESAs in their ability to better assure that students in the United States have an equal opportunity to receive a quality education. AESA believes these objectives and goals can best be achieved through a united, national organization.

AESA shall be operated as a non-profit corporation under the laws of the commonwealth of Virginia. AESA may exercise such powers as are in furtherance of the exempt purposes of the organization and shall not carry on any activities not permitted to be carried on by a corporation exempt from federal income tax under Section 501(a) of the Internal Revenue Code of 1986, as amended (the Code), by reason of description in Section 501(c)(6) of the Code.

The organization shall be divided into four geographical areas ("Regions") as follows:

- I. Central Region
2. Eastern Region
3. Southern Region
4. Western Region

The AESA Executive Council (Council) shall review on an annual basis the regional distribution of membership to ensure that representation between voting Regions is as equal as possible. The Council may adjust the boundaries of the four voting Regions as it deems appropriate, and shall adjust boundaries when any voting Region exceeds forty (40) percent of the total Voting Membership.

Article II. Membership

Section 1. Regular (Voting) Membership

ESAs created primarily for the purpose of providing educational services to local education agencies are eligible to participate as voting members (Voting Members') of AESA.

Certain services, including, but not limited to the following services, will be made available to Voting Members in connection with their membership in AESA:

- a. Dissemination of information regarding organizational structure, supportive legislation and regulations, and exemplary regional programs and services.
- b. Communication to local and state school boards, governmental bodies and agencies, and the education profession about the need for ESA services and programs.
- c. Facilitation of research to generate and expand knowledge of the functions of the ESAs, as well as the effective and efficient development and management of services and programs.
- d. Facilitation and provision of staff development programs for ESA Chief Executive Officers (CEOs), staff and board members.

- e. Technical assistance to localities and states interested in establishing ESAs.
- f. Advocacy for the needs of ESAs directly with Congress and other agencies.

Section 2. Associate Membership (Nonvoting)

Any individual not associated with an ESA. For an individual who has retired from an ESA and who has a continued interest in supporting educational service agencies.

Section 3. Institutional Membership (Nonvoting)

- a. State Education Agency (SEA) personnel.
- b. Any organization not qualifying as a Voting Member under Article II, Section I above and which furnishes educational support services to public elementary and secondary schools may be granted membership upon Council approval.

Section 4. Business Membership (Nonvoting)

For businesses interested in working with educational service agencies.

Article III. Executive Council

Section I. Governance

The governance of AESA shall be under the authority of its voting members. The Council and Voting Members shall have the authority to undertake those matters as more fully set forth herein.

Section 2. Representation

Each Voting Member shall be represented by its respective CEO.

Section 3. Council of the Association of Educational Services Agencies

- a. The number of Council members shall be twelve. Each Region described in Article 1 shall be represented by three seats. The number of Council members may be increased or decreased from time to time by the Council. The immediate past President of the Council shall hold office as the twelfth Council member or shall serve as a designated thirteenth seat depending on the year of the presidency.
- b. In order to maintain twelve Council members and have four year terms of office, each region will elect Council members three out of four years. The election sequence will be determined by the Council with each Region receiving a bye every four years.

Section 4. Selection of Council Members

- a. Any CEO of a Voting Member is eligible to be a candidate for office on the Council, provided the CEO's member organization attained Voting Membership status by October 1 of the year in which the election is to be held.
- b. Any CEO of a Voting Member can nominate an eligible candidate. This nomination shall be made on a form provided by AESA to the Voting Members in the year in which the election is to be held. The nomination shall be for the expiring term(s) in each Region.

- c. If there are more than two nominees for a Council position in a Region, there shall be a primary election in that Region. The top two vote recipients from different states shall become the nominees for that Region on the national ballot.
- d. A state shall have only one member on the Council at any given time. Notwithstanding anything to the contrary herein, no state shall be represented by an elected member on the Council for more than four consecutive years.
- e. Each Voting Member agency shall have only one vote.
- f. If a candidate for a region runs unopposed the Council may by majority vote cast a unanimous ballot for the candidate on behalf of the membership.
- g. All nominations and elections for open Council positions shall be made by mail or electronically.

Section 5. Certification of Election

The AESA Executive Director and at least two AESA Council members shall count ballots and certify the election results.

Section 6. Term of Office of the Council Members

The members of the Council shall serve a four-year term commencing at the first regular Council meeting after the election. Elected Council members shall not serve for more than four years in succession.

Section 7. Vacancy in the Office of Council member

If a Council seat is vacant because (i) the Regular Members failed to nominate an eligible candidate for that position, (ii) of the retirement, resignation, or death of a Council Member, or (iii) of any other reason deemed acceptable by the Council, the Council at its next meeting may appoint a member to serve in that seat for the remaining portion of that seat's term according to AESA policy.

Section 8. Change in Status of Council Member

If the status of a Council member changes such that the Council member is no longer a CEO of an ESA, the Council member must immediately resign at the time his or her status changes.

Section 9. Officers of the Council

At the first regular Council meeting after the AESA election, the Council shall install the new President and President-elect/Vice President (hereafter referred to as President-elect). The President-elect shall be elected at the winter Council meeting according to the AESA policy. The President-elect's term of office shall commence at the first regular Council meeting after the AESA election and he or she shall become President the following year.

- a. The President shall be vested with the authority to preside at all meetings of the Council and to carry out those actions directed by the Council.
- b. The President-elect shall serve in the absence of the President with the same powers and duties as the President.

Section 10. Succession of Council Officers

If the President leaves office before the end of his or her term, the President-elect shall assume responsibility as acting President for the remainder of that term and for the term for which he/she was elected. A new President-elect will be elected immediately upon the former President-elect assuming the office of President.

Section 11. Meetings

- a. The Council shall have at least four regularly scheduled meetings each year. Special meetings may be called as necessary by the President.
- b. The AESA Annual Conference shall be held on a date set by the Council.

Section 12. Functions of the Council

The Council shall have general charge of the affairs, property and assets of the AESA. The Council shall have authority to undertake, or cause a representative acting on behalf of the Council to undertake, the following functions in connection with the operations of AESA.

- a. incur any debt on behalf of AESA in excess of \$5,000; approve any and all AESA contracts for services or materials with a value in excess of \$5,000; or pledge, mortgage, hypothecate, encumber, or grant a security interest in any property or assets of AESA.
- b. make final determinations regarding the appointment of the Executive Director of AESA; negotiate, execute and deliver service contracts with the selected Executive Director and any other contractors the Council deems necessary to assist it and the Executive Director with the operations of AESA.
- c. approve the revenue and expenditure budgets for AESA by October 1 of each year.
- d. review program recommendations made by the AESA Executive Director and authorize implementation of such recommendations.
- e. make the final determination of the eligibility policies for membership in AESA. Any exceptions to eligibility policies will be made by the Council upon recommendation of the Executive Director.
- f. maintain a close working relationship with the Executive Director and other national and state organizations in promoting the regional system of education.
- g. set annual membership fees and through its Executive Director shall be responsible for the collection of the fees.
- h. conduct an annual performance review of the Executive Director's contract.

Section 13. Transaction of Business

A majority (seven) of the voting Council members shall constitute a quorum to conduct business. A majority of those Council members present shall be required to take an action or approve any resolutions of the Council.

Section 14. Travel Expenses

Normal and reasonable travel expenses incurred by Council members to attend the regular and special meetings of the council shall be reimbursed, provided such expenses meet the AESA association policies.

Section 15. Committees/Task Forces

The Council may create committees and/or task forces in order to meet the needs of the organization.

Article IV. Responsibilities of the Executive Director of the Association of Educational Service Agencies to the Council

The Executive Director shall serve under the direction and authority of the Council. The Executive Director shall undertake those duties, responsibilities and functions delegated to him by the Council, including, but not limited to, the following:

- a. Recommending goals and priorities for AESA.
- b. Providing professional leadership for all ESAs.
- c. Serving as liaison for AESA with other appropriate entities.
- d. Serving as secretary and treasurer and nonvoting ex-officio member of the Council.
- e. Planning and recommending programs of operation to the Council
- f. Developing and submitting the annual budget.
- g. Providing analyses of revenue and expenditures.
- h. Recommending sub-contractors and/or staff as needed, consistent with the goals and objectives of AESA.
- i. Administering contracts.
- j. Negotiating and entering into contracts for services and materials valued at less than \$10,000 with a duration of less than one year.
- k. Providing for an audit that shall be consistent with generally acceptable accounting principles.

Article V. Miscellaneous

Section I. Fiscal Year

The fiscal year of AESA shall be July 1 to June 30.

Section 2. Checks, Notes and Contracts

The Council shall determine who shall be authorized from time to time on AESA's behalf to sign checks, drafts, or other orders for payment of money; to sign acceptances notes or other evidences of indebtedness; to enter into contracts; or to execute and deliver other documents and instruments.

Section 3. Books and Records

AESA shall keep at its principal registered office (1) correct and complete books and records of accounts, and (2) minutes of the proceedings of the Council and any committee having any of the authority of the Council.

Section 4. Amendment of Articles and Bylaws

Proposed changes to the Articles of Incorporation and Bylaws shall be considered at the regular meeting of the Council. Amendments to the Articles of Incorporation and Bylaws approved by the Council will be submitted to the membership either by mail or electronically. A majority of

those voting are required for adoption of Amendments to the Articles of I corporation and/or Bylaws changes.

Section 5. Indemnification and Insurance

Unless otherwise prohibited by law, AESA shall indemnify any Council member, and may, by resolution of the Council, indemnify any employee or contractor against any and all expenses and liabilities actually and necessarily incurred by him or her, imposed on him or her in connection with any claim, action, suit, or proceeding (whether actual or threatened, civil, criminal, administrative, or investigative, including appeals) to which he or she may be or is made a party by reason of being or having been such Council member, employee or contractor; subject to the limitation, however, that there shall be no indemnification in relation to matters as to which he or she shall be adjudged in such claim, action, suit or proceeding to be guilty of a criminal offense or liable to AESA for damages arising out of his or her own gross negligence or misconduct in the performance of a duty to AESA.

Amounts paid in indemnification of expenses and liabilities may include, but shall not be limited to, legal counsel fees and other fees; costs and disbursements; and judgements, fines, and penalties against, and amounts paid in settlement by, such Council member, employee or contractor. AESA may advance expenses to, or where appropriate may itself, at its expense, undertake the defense of, any Council member, employee or contractor; provided, however, that such Council member, employee or contractor shall undertake to repay or to reimburse such expense if it should be ultimately determined that he or she is not entitled to indemnification under this Article.

The provisions of this Article shall be applicable to claims, actions, suits, or proceedings made or commenced after the adoption hereof, whether arising from acts or omissions to act occurring before or after adoption hereof.

The indemnification provided by this Article shall not be deemed exclusive of any other rights to which such Council member, employee or contractor may be entitled under any statute, Bylaw, agreement, vote of the Council, or otherwise and shall not restrict the power of AESA to make any indemnification permitted by law.

The Council may authorize the purchase of insurance on behalf of any Council member, employee, or contractor against any liability asserted against or incurred by him or her which arises out of such person's status as a Council member, employee or contractor or out of acts taken in such capacity, whether or not AESA would have the power to indemnify the person against that liability under law.

If any part of this Article shall be found in any action, suit, or proceeding to be invalid or ineffective, the validity and the effectiveness of the remaining parts shall not be affected.

Appendix D
Association of Educational Service Agencies Councils

1977 Organizational Ad Hoc Committee

Walter Turner, CO - Chr.
Leo Blodgett, WA
Urey Arnold, MI
Walter Bishop, IL
Calvin Bones, IA
Donald Caudill, WV
Tom Lawrence, TX
Justus Prentice, NY
Daniel Rohrbach, PA

1997-78 NOCIESA Council*

Justus Prentice, NY – Pres.
Leo Blodgett, WA
Urey Arnold, MI
Walter Bishop, IL
Calvin Bones, IA
Donald Caudill, WV
Glenn Hoffman, CA
Tom Lawrence, TX
Daniel Rohrbach, PA
*Walter Turner selected as NOCIESA
Executive Director

1978-79 NOCIESA Council

Leo Blodgett, WA – Chr.
Urey Arnold, MI
Calvin Bones, IA
William Callahan, NY
Donald Caudill, WV
Glenn Hoffman, CA
William Inman, OH
Tom Lawrence, TX
Daniel Rohrbach, PA

1979-80 AAESA Council

Urey Arnold, MI – Pres.
Leo Blodgett, WA
Calvin Bones, IA
William Callahan, NY
Donald Caudill, WV
Glenn Hoffman, CA
William Inman, OH
Tom Lawrence, TX
Daniel Rohrbach, PA

1980-81 AAESA Council

Urey Arnold, MI – Pres.
Leo Blodgett, WA
William Callahan, NY
Glenn Hoffman, CA
William Inman, OH
Harry M. Laing, WV
Melvin F. Mead, OR
Lloyd Ruoss, PA
Clark A. Stevens, IA

1981-82 AAESA Council

William Callahan, NY – Pres.
Urey Arnold, MI
Leo Blodgett, WA
H.M. Fullerton, TX
Harry M. Laing, WV
Randall T. Lambert, MN
Melvin F. Mead, OR
Lloyd Ruoss, PA
Clark A. Stevens, IA

1982-83 AAESA Council

Jerry Stout, PA – Pres.
Melvin Bollom, WI
William Callahan, NY
H.M. Fullerton, TX
Kenneth Howerton, WA
Harry M. Laing, WV
Randall T. Lambert, MN
Melvin F. Mead, OR
Clark A. Stevens, IA

1984-85 AAESA Council

Kenneth Howerton, WA – Pres.
Melvin Bollom, WI
Louis Delsol, CA
Don Roseberry, IA
Glen Shaw, MN
Jerry Stout, PA
Richard TenHaken, NY
Allan Thede, OR
Peter Willner, CT

1986-87 AAESA Council

Dick TenHaken, NY – Pres.
Dwight Bode, IA
Donald Caudill, WV
Darrel D. Davis, CO
Louis Delsol, CA
Dennis Harkens, PA
Dwayne Schmaltz, WI
Ron Wilkerson, OR

1988-89 AAESA Council

Ron Wilkerson, OR – Pres.
Dwight Bode, IA
Donald Caudill, WV
Darrel D. Davis, CO
Lester Martisko, MN
Joseph Nicita, MI
Charles Terrell, CA
Freeman VanWickler, NY
William Vantine, PA

1983-84 AAESA Council

Jerry Stout, PA – Pres.
William Callahan, NY
Melvin Bollom, WI
H.M. Fullerton, TX
Kenneth Howerton, WA
Randall T. Lambert, MN
Allan Thede, OR
Don Roseberry, IA
Glen Shaw, MN
Peter Willner, CT

1985-86 AAESA Council

Glen Shaw, MN – Pres.
Donald Caudill, WV
Louis Delsol, CA
Dennis Harken, PA
Donald Roseberry, IA
Dwayne Schmaltz, WI
Richard TenHaken, NY
Allan Thede, OR
Peter Willner, CT

1987-88 AAESA Council

Dennis Harken, PA – Pres.
Dwight Bode, IA
Donald Caudill, WV
Darrel D. Davis, CO
Lester Martisko, MN
Dwayne Schmaltz, WI
Charles Terrell, CA
Freeman VanWickler, NY
Ron Wilkerson, OR

1989-90 AAESA Council

Lester Martisko, MN – Pres.
David Calchera, CT
Darrel Davis, CO
Dale Jensen, IA
Joe Nicita, MI
Dennis L. Peterson, WA
Charles Terrell, CA
Freeman VanWickler, NY
William Vantine, PA

1990-91 AAESA Council

Charles, Terrell, CA – Pres.
 Jay Bouchard, NY
 David Calchera, CT
 Lee E. Christiansen, OR
 Dale Jensen, IA
 Joseph Nicita, MI
 Tom Pagan, IN
 Dennis L. Peterson, WA
 William Vantine, PA

1992-93 AAESA Council

Tom Pagan, IN – Pres.
 Jay Bouchard, NY
 Ron Fielder, IA
 William Keane, MI
 Joseph Lagana, PA*
 Bobbie, Roberts, TX
 Boyd Swent, OR**
 Brian Talbott, WA
 Peter Young, CT
 David Calchera, CT, Past-Pres.
 *Replaced Gary Miller
 **Replaced Lee Christiansen

1994-95 AAESA Council

Brian Talbott, WA – Pres.
 Harry Beavers, TX
 Ron Fielder, IA
 Peter Kacharis, NY
 Joseph Lagana, PA
 Glen Shaw, MN
 Boyd Swent, OR
 George Woons, MI
 Peter Young, CT
 William Keane, MI, Past Pres.

1991-1992 AAESA Council

David Calchera, CT – Pres.
 Jay Bouchard, NY
 Lee E. Christiansen, OR*
 Dale Jensen, IA
 William Keane, MI
 Gary Miller, PA
 Tom Pagan, IN
 Bobbie Roberts, TX
 Brian Talbott, WA
 *Selected AAESA Executive Director

1993-94 AAESA Council

William Keane, MI – Pres.
 Peter Kachris, NY
 Ron Fielder, IA
 Joseph Lagana, PA
 Bobbie Roberts, TX
 Glen Shaw, MN
 Boyd Swent, OR
 Brian Talbott, WA
 Peter Young, CT
 Tom Pagan, IN, Past Pres.

1995-96 AAESA Council

Glen Shaw, MN - Pres.
 Harry Beavers, TX
 Ron Dickinson, IA
 Peter Kachris, NY
 Joseph Lagana, PA
 James Miller, CO
 Virginia Seccombe, CT
 Boyd Swent, OR
 George Woons, MI
 Brian Talbott, WA, Past Pres.

1996-97 AAESA Council

Joseph Lagana, PA – Pres.
 Harry Beavers, TX
 Frank Deebach, WA
 Ron Dickinson, IA
 Joseph Marinelli, NY
 Steve Jones, CO
 Virginia Seccombe, CT
 Don Stevens, WI
 George Woons, MI
 Glen Shaw, MN – Past Pres.

1998-99 AAESA Council

Don Stevens, WI – Pres.
 Rita Cook, KS
 Frank Deebach, WA
 David Distel, OH
 Mike Flanagan, MI
 Edward Frye, PA
 Wendell Kuykendall, CA
 Joseph Marinelli, NY
 Craig Stanley, MA
 Virginia Seccombe, CT, Past Pres.

2000-2001 AESA Council

Mike Flanagan, MI – Pres.
 Twyla Barnes, WA
 Wayne Bell, NE
 Rita Cook, KS
 Jack Harmon, AZ
 William Miles, NY
 Glenn Pelecky, IA
 Howard Solomon, NY
 Bob Witten, PA
 David Distel, OH, Past Pres.

1997-98 AAESA Council

Virginia Seccombe, CT – Pres.
 Frank Debach, WA
 Ron Dickinson, IA
 David Distel, OH
 Steve Jones, CO
 Wendell Kuykendall, CA
 Joseph Marinelli, NY
 Craig Stanley, MA
 Don Stevens, WI
 Joseph Lagana, PA, Past Pres.

1999-2000 AAESA Council

David Distel, OH – Pres.
 Rita Cook, KS
 Mike Flanagan, MI
 Jack Harmon, AZ
 Wendell Kuykendall, CA
 Glenn Pelecky, IA
 Craig Stanley, MA
 Howard Solomon, NJ
 Bob Witten, PA*
 Don Stevens, WI, Past Pres.
 *Replaced Edward Frye

2001-2002 AESA Council

Glenn Pelecky, IA – Pres.
 Twyla Barnes, WA
 Wayne Bell, NE
 David Calchera, CT
 Tim Gavigan, WI
 Jack Harmon, AZ
 Joe Marinelli, NY*
 Colleen Wilcox, CA
 Mike Flanagan, MI, Past Pres.
 *Replaced William Miles, NY

2002-2003 AESA Council

Joe Marinelli, NY, Pres.
Tim Gavigan, WI
Wayne Bell, NE
David Calchera, CT
Jayne Crisp, KY
Bill McKinney, TX
Judith Miller, MS
Terry Nelson, GA
Ed Schmitt, OR
Lee Warne, MN
Colleen Wilcox, CA
Twyla Barnes, WA, Past Pres.

2004-2005 AESA Council

Bill McKinney, TX, Pres.
Jayne Crisp, KY
Doug Garman, OH
Richard Lane, MI*
Linda Lowe, NC
Dale McCall, CO
William Mayes, MI
Judith Miller, MS
Terry Nelson, GA
Rick Saunders, AR
Ed Schmitt, OR
Lee Warne, MN
Robert Witten, PA
Tim Gavigan, Past Pres.

*Replaced William Mayes

2006-2007 AESA Council

Douglas Garman, OH, Pres.
Dee Alarcon, CA
Joe Crozier, IA
Lindy Franks, AR
John Hough, WV
Mick Loughran, NE
Linda Lowe, NC
Vicki Markavitch, MI
Terry Munther, WA
Joan Schuman, MA
Ed VanderTook, CO
Robert Witten, PA
Lee Warne, MN, Past Pres.

2003-2004 AESA Council

Tim Gavigan, Pres.
Bill McKinney, TX
David Calchera, CT
Jayne Crisp, KY
Doug Garman, OH
Dale McCall, CO
Judith Miller, MS
Terry Nelson, GA
Rick Saunders, AR
Ed Schmitt, OR
Lee Warne, MN
Colleen Wilcox, CA

2005-2006 AESA Council

Lee Warne, MN, Pres.
Joe Crozier, IA
Doug Garman, OH
Richard Lane, MI
Linda Lowe, NC
Dale McCall, CO
Judith Miller, MS
Terry Munther, WA
Terry Nelson, GA
Rick Saunders, AR
Ed Schmitt, OR
Joan Schuman, MA
Robert Witten, PA
Bill McKinney, TX, Past Pres.

2007-2008 AESA Council

Robert Witten, PA – Pres.
Dee Alarcon, CA
James Baldwin, NY
John Bass, TX
Mike Cook, KS
Joe Crozier, IA
John Hough, WV
Mick Loughran, NE
Linda Lowe, NC
Vickie Markavitch, MI
Rich McBride, WA
Joan Schuman, MA
Robert Witten, PA
Douglas Garman, OH, Past Pres.

2008-2009 AESA Council

Joseph Crozier, IA – Pres.
Dee Alarcon, CA
James Baldwin, NY
John Bass, TX
Cliff Carmody, MN
Dee Cockrille, WV
Mike Cook, KS
Lindy Franks, AR
Dan Hare, OH
Mick Loughran, NE
Rich McBride, WA
Joan Schuman, MA
Robert Witten, PA, Past Pres.

2010-2011 AESA Council

Mike Cook, KS – Pres.
R. Stephen Aguirre, NM
John Bass, TX
Cliff Carmody, MN
Bruce Dennison, IL
Lindy Franks, AK
Dan Hare, OH
James Langlois, NY
Jack McAlpin, MS
Rich McBride, WA
Joan Wade, WI
Marjorie Wallace, PA
Joseph Crozier, IA, Past Pres

2012-2013 AESA Council

Stephen Aguirre, NM – Pres.
Allen Buyck, NY
Dee Cockrille, WV
Kevin Konarska, MI
Mud MacDonnell, MA
Jerry Maze, TX
Jack McAlpin, MS
Rich McBride, WA
Jerry Shiveley, PA
Joe Silva, CA
Joan Wade, WI
Angie Zarvell, IL
Cliff Carmody, MN, Past-Pres.

2009-2010 AESA Council

Dee Alarcon, CA – Pres.
R. Stephen Aguirre, NM
John Bass, TX
Cliff Carmody, MN
Dee Cockrille, WV
Mike Cook, KS
Bruce Dennison, IL
Lindy Franks, AK
Dan Hare, OH
James Langlois, NY
Mick Loughran, NE
Marjorie Wallace, PA
Joseph Crozier, IA, Past Pres.

2011-2012 AESA Council

Cliff Carmody, MN – Pres.
Dee Cockrille, WV
Dave Distel, OH
Bud MacDonnell, MA
Rich McBride, WA
Jerry Shiveley, PA
Joe Silva, CA
Joan Wade, WI
Angie Zarvell, IL
Mike Cook, KS, Past Pres.

2013-2014 AESA Council

Rich McBride, WA – Pres.
David Branch, OH
Allen Buyck, NY
Dee Cockrille, WV
Mike Cook, KS
Kevin Konarska, MI
Jerry Maze, TX
Jack McAlpin, MS
Joe Silva, CA
Joan Wade, WI
Jeff West, NE
Stephen Aguirre, NM, Past Pres.

2014-2015 AESA Council

Dee Cockrille, WV – Pres.
Phoebe Bailey, AR
David Branch, OH
Allen Buyck, NY
Mike Cook, KS
Cathy Cummins, MA
Jerry Maze, TX
Scott Menzel, MI
Jeremy Meyers, CA
Suzanne Riley, MN
Sheryl Weinberg, AK
Jeff West, NE
Rich McBride, WA, Past-Pres.

2015-2016 AESA Council

Jerry Maze, TX – Pres.
Phoebe Bailey, AR
David Branch, OH
Jill Broussard, AZ
Allen Buyck, NY
Mike Cook, KS
John George, PA
Nancy Hutchinson, KY
Scott Menzel, MI
Suzanne Riley, MN
Sheryl Weinberg, AK
Jeff West, NE
Rich McBride, WA, Past Pres.

Appendix E

Annual Conference Sites

1986	Omni Hotel, San Diego, CA - AAESA Staff
1987	Embassy Suites, Orlando, FL – AAESA Staff
1988	Marriott Resorts, Panama City FL – AAESA Staff
1989	Wyndham Paradise Valley, Phoenix, AZ – AAESA Staff
1990	Tradewinds, St. Petersburg Beach, FL – AAESA Staff
1991	Holiday Inn, Riverwalk, San Antonio, TX – William Keane, MI*
1992	Doubletree, Phoenix, AZ – Brian Talbott, WA**
1993	Tradewinds, St. Petersburg Beach, FL – Ron Fielder, IA
1994	Ritz-Carlton, Palm Springs, CA – Peter Young, CT
1995	Hyatt-Riverwalk, San Antonio, TX – Harry Beavers, TX
1996	Hilton Head, SC – Virginia Seccombe, CT
1997	Del Monte Hotel, Monterey, CA – Joseph J. Marinelli, NY
1998	Hilton South, Phoenix, AZ – David Distel, OH
1999	Marriott Hotel, San Marco Island, FL – David Distel, OH
2000	Venetian Hotel, Las Vegas, NV – Michael Flanagan, MI***
2001	Atlanta Marriott Marquis, Atlanta, GA – Glenn Pelecky, IA
2002	Hyatt Regency, Dallas, TX – Twyla Barnes, WA
2003	Marco Island Marriott Resort, Marco Island, FL – Bill McKinney
2004	J.W. Marriott Desert Ridge Resort & Spa, Phoenix, AZ – Don Stevens
2005	Savannah International Trade & Convention Center, GA – Doug Garman
2006	Desert Springs J.W. Marriott Resort & Spa – Palm Desert, CA – Don Stevens
2007	Tampa Convention Center, Tampa, FL – Bob Witten
2008	J.W. Marriott Desert Ridge Resort & Spa, Phoenix, AZ – Joe Crozier
2009	Austin Convention Center, Austin, TX
2010	Savannah International Trade & Convention Center, GA
2011	Broadmoor Hotel, Colorado Springs, CO
2012	Tampa Convention Center, Tampa, FL
2013	JW Marriott Hill Country, San Antonio, TX
2014	San Diego Hilton, San Diego, CA
2015	Hyatt New Orleans, New Orleans, LA
2016	Savannah International Trade & Convention Center, Savannah, GA

Future AESA Annual Conference Sites

2017	JW Marriott, San Antonio, TX
2018	Broadmoor, Colorado Springs, CO
2019	JW Marriott Desert Ridge Resort & Spa, Phoenix, AZ
2020	Hilton Orlando, Orlando, FL
2021	Marriott Marquis, Houston, TX

*First AAESA conference to open attendance to regional ESA board members and ESA staff and the beginning of AAESA’s dramatic growth in attendance and participation.

The underlying rationale for the conference was that the program be presented by and for ESA people. The conference established the basis for sharing ESA information. This was also the first conference to be chaired by an AAESA council member.

**The awards presentation was moved from the AAESA pre-conference at the AASA convention to the AESA fall conference. This was the first AAESA conference to exceed an attendance of one hundred.

***The first AESA Conference to exceed 1200 attendees.

Appendix F

AESA Award Recipients

The Justus A. Prentice Award acknowledges contributions through executive leadership in the advancement of regional educational service agency programs at the regional, state, and national levels.

Justus A. Prentice Award Recipients

1978 Justus A. Prentice, NY (Posthumously)
1979 Thomas Summerville, OR
1980 Daniel A. Rohrbach, PA (Posthumously)
1981 Robert D. Benton, IA
1982 Urey Arnold, MI
1983 William L. Phillis, OH
1984 Ruby Dubois, WA; Ella Mae Gogel, IA
1985 Roy Brubacher, CO
1986 Noble Gividen, NY
1987 Dwight G. Bode, IA
1988 Randall Lambert, MN (Posthumously)
1989 Allan J. Thede, OR
1990 Walter Turner, CO
1991 Tom Lawrence, TX
1992 Warren J. Fudge, MI
1993 Richard TenHaken, NY
1994 Dale Jensen, IA
1995 Kelly F. Blanton, CA
1996 Jerry Bennett, OR
1997 Glen Shaw, MN
1998 William Ross, MI
1999 Lee E. Christiansen, OR
2000 Peter C. Young, CT
2001 Robert Witten, PA
2002 Ronald Fielder
2003 Dennis Harken, PA
2004 Dave Distel, OH
2005 David Calchera, CT
2006 Virginia Seccombe, CT
2007 Twyla G. Barnes, WA
2008 Joseph Marinelli, NY
2009 William McKinney, TX
2010 Lee Warne, MN
2011 Joan Schuman, MA and Monte E. Bridges, WA
2012 David W. Gordon, CA
2013 Wayne Bell, NE
2014 Joe Crozier, IA
2015 Lisa Hagel, MI
2016 No Award Presented

The Walter G. Turner Award recognizes contributions in the advancement of regional educational programs at the regional, state, and/or national levels.

Walter G. Turner Award Recipients

- 1983 Herbert Grover, WI*
- 1984 E. Robert Stephens, MD*
- 1985 Mark Shedd, CT*
- 1986 Paul B. Salmon, NA (Posthumously)*
- 1987 Ira A. Larson, IA*
- 1988 Max W. Schlotter, TX*
- 1990 Gretchen Ilgenfritz, WA and Irvin A. Karam, PA*
- 1993 Edith Lippert, OR
- 1994 William M. Floyd, IN
- 1995 Fred Greenough, WA
- 1996 Al Bauer, WA
- 1997 Dave Christensen, NE
- 1998 J. Harold McConnell, NY
- 1999 R. Bruce Hunter, AESA
- 2000 Ted Lempert, CA
- 2001 Jack O'Connell, CA
- 2002 Rod Paige, United States Secretary of Education, Washington D.C.
- 2003 Terry Bergeson, WA
- 2004 Ted Stilwill, IA
- 2005 Howard P. "Buck" McKean, CA and Lee Baggett, OR
- 2006 Shirley Neeley, TX
- 2007 Jay D. Rockefeller, WV and Arlene Setzer, OH
- 2008 Darrell Steinberg, CA
- 2009 Michael P. Flanagan, MI
- 2010 Carolyn (Lynne) Cannon, IA and William K. Bogdan, OH
- 2011 Lowell Johnson, WV
- 2012 Massachusetts State Senator Sonia Chang-Diaz and Massachusetts State Representative
Alice H. Peisch
- 2013 No Award Presented
- 2014 James Denova, PA
- 2015 Dale McCall, CO
- 2016 Kristn Olsen, California State Assembly, CA

*Prior to 1993, the Walter G. Turner Award was known as the **Special Recognition Award**

The E. Robert Stephens Award acknowledges contributions that advance understanding of regional educational agencies through research, writing, and/or publications at the regional, state and national levels.

E. Robert Stephens Award Recipients

1993 E. Robert Stephens, MD
1994 No Award Presented
1995 No Award Presented
1996 Douglas Mitchell, CA
1997 No Award Presented
1998 Albert Deal, MI
1999 William Keane, MI
2000 Linda Darling-Hammond, CA
2001 No Award Presented
2002 Craig Stanley, MA
2003 No Award Presented
2004 David Arsen, Courtney Bell and David Plank, MI
2005 Hobart Harmon, VA
2006 Susan Leddick, MT
2007 Milton Chen, CA
2008 No Award Presented
2009 No Award Presented
2010 Jerry Maze, TX
2011 No Award Presented
2012 No Award Presented
2013 Sue Feldman, WA
2014 Mark Jones, NY
2015 No Award Presented
2016 Kelly Gillespie, KS

The Brian L. Talbott Award acknowledges an individual or agency for contributions in the area of technological innovation and support to local districts and educational service agencies.

Brian L. Talbott Award Recipients

2009 Geoffrey Craven, Lewisburg, PA
2010 Educational Service Unit 10, Kearney, NE
2011 No Award Presented
2012 EDJOIN Program of CCSESA, Sacramento, CA
2013 Northeast Service Cooperative, Mountain Iron, MN
2014 Grant Wood AEA Technology Unit, Cedar Rapids, IA
2015 K-12 High Speed Network, El Centro, CA
2016 Education Matters, Fresno, CA

Meritorious Service Award is given periodically by the AESA Council to recognize an individual who has made outstanding contributions to educational service agencies.

Meritorious Service Award Recipients

2002 Susan Sclafani, USED

2013 William G. Keane, MI

Appendix G
Association of Educational Service Agencies
Educational Foundation Boards

2000-2001 Foundation Board

Ron Fielder, IA, Chair
Dave Distel, OH
Mike Flanagan, MI
William O'Connell, NH
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Peter Young, CT
Brian Talbott, WA, Ex Officio

2002-2003 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
Dave Distel, OH
Tim Gavigan, WI
Joe Marinelli, NY
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Peter Young, CT
Brian Talbott, WA, Ex Officio

2004-2005 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
David Calchera, CT
Lee Christiansen, OR
Dave Distel, OH
Tim Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Bill McKinney, TX
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Lee Warne, MN
Peter Young, CT
Brian Talbott, WA, Ex Officio

2001-2002 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
Dave Distel, OH
William O'Connell, NH
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Peter Young, CT
Brian Talbott, WA, Ex Officio

2003-2004 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
Dave Distel, OH
Tim Gavigan, WI
Joe Marinelli, NY
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Peter Young, CT
Brian Talbott, WA, Ex Officio

2005-2006 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
David Calchera, CT
Lee Christiansen, OR
Dave Distel, OH
Doug Garman, OH
Tim Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Bill McKinney, TX
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Lee Warne, MN
Peter Young, CT
Brian Talbott, WA, Ex Officio

2006-2007 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
David Calchera, CT
Lee Christiansen, OR
Dave Distel, OH
Tim Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Bill McKinney, TX
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Lee Warne, MN
Peter Young, CT
Brian Talbott, WA, Ex Officio

2008-2009 Foundation Board

Ron Fielder, IA, Chair
Stephen Aguirre, NM
Dee Alarcon, CO
Twyla Barnes, WA
David Calchera, CT
Lee Christiansen, OR
Joe Crozier, IA
Dave Distel, OH
Ron Fielder, IA
Timothy Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Bill McKinney, TX
Virginia Seccombe, CT
Don Stevens, WI
Robert Witten, PA
Brian Talbott, WA
Peter Young, CT

2010-2011 Foundation Board

Virginia Seccombe, CT, Chair
Stephen Aguirre, NM
Twyla Barnes, WA
David Calchera, CT
Cliff Carmody, MN

2007-2008 Foundation Board

Ron Fielder, IA, Chair
Twyla Barnes, WA
David Calchera, CT
Lee Christiansen, OR
Joe Crozier, IA
Dave Distel, OH
Douglas Garman, OH
Timothy Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Bill McKinney, TX
Glenn Pelecky, IA
Virginia Seccombe, CT
Don Stevens, WI
Lee Warne, MN
Robert Witten, PA
Brian Talbott, WA
Peter Young, CT

2009-2010 Foundation Board

Ron Fielder, IA, Chair
Stephen Aguirre, NM
Dee Alarcon, CA
Twyla Barnes, WA
David Calchera, CT
Lee Christiansen, OR
Joe Crozier, IA
Dave Distel, OH
Timothy Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Bill McKinney, TX
Glenn Pelecky, IA
Virginia Seccombe, CT
Brian Talbott, WA
Robert Witten, PA
Peter Young, CT

2011-2012 Foundation Board

Twyla Barnes, WA, Chair
Stephen Aguirre, NM
John Bass, TX
Cliff Carmody, MN
Dee Cockrille, WV

Lee Christiansen, OR
Dee Cockrille, WV
Mike Cook, KS
J. Crozier, IA
Dave Distel, OH
Ron Fielder, IA
Timothy Gavigan, WI
Susan Leddick, MT
Joe Marinelli, NY
Glenn Pelecky, IA
Brian Talbott, WA
Lee Warne, MN

2012-2013 Foundation Board

Twyla Barnes, WA, Chair
Stephen Aguirre, NM
John Bass, TX
Cliff Carmody, MN
Dee Cockrille, WV
J. Crozier, IA
Dave Distel, OH
Ron Fielder, IA
Susan Leddick, MT
Joe Marinelli, NY
Glenn Pelecky, IA
Brian Talbott, WA
Joan Wade, WI
Lee Warne, MN

2014-2015 Foundation Board

Dave Distel, OH, Chair
John Bass, TX
Cliff Carmody, MN
Dee Cockrille, WV
M. Cook, KS
J. Crozier, IA
Ron Fielder, IA
Susan Leddick, MT
Joe Marinelli, NY
Rich McBride, WA
Jerry Shiveley, PA
Brian Talbott, WA
Joan Wade, WI
Lee Warne, MN

Mike Cook, KS
J. Crozier, IA
Dave Distel, OH
Ron Fielder, IA
Susan Leddick, MT
Joe Marinelli, NY
Glenn Pelecky, IA
Brian Talbott, WA
Joan Wade, WI
Lee Warne, MN

2013-2014 Foundation Board

Dave Distel, OH, Chair
Twyla Barnes, WA
John Bass, TX
Cliff Carmody, MN
Dee Cockrille, WV
J. Crozier, IA
Ron Fielder, IA
Susan Leddick, MT
Joe Marinelli, NY
Rich McBride, WA
Brian Talbott, WA
Joan Wade, WI
Lee Warne, MN

2015-2016 Foundation Board

Dave Distel, OH, Chair
R. Stephen Aguirre, NM
John Bass, TX
Cliff Carmody, MN
Mike Cook, KS
Joe Crozier, IA
Susan Leddick, MT
Jerry Maze, TX
Rich McBride, WA
Jerry Shiveley, PA
Brian Talbott, WA
Joan Wade, WI
Jeff West, NE