

CAPISTRANO UNIFIED SCHOOL DISTRICT  
33122 Valle Road  
San Juan Capistrano, CA 92675

BOARD OF TRUSTEES  
Special Meeting

May 23, 2017

Open Session: 4:30 p.m.

**AGENDA**

**RECORDING OF SCHOOL BOARD MEETINGS**

**In accordance with Board Policy 9324, Board Minutes, all Regular School Board Meetings will be audio recorded.**

*Trustee Hatton-Hodson will teleconference into the meeting from the following location:  
10288 Crescenzi Pl, Smartsville, California 95977*

**CALL TO ORDER – ROLL CALL**

**PLEDGE OF ALLEGIANCE**

**ADOPTION OF THE AGENDA**

**DISCUSSION ACTION ITEMS**

**1. EXTENSION OF CANDIDATE APPLICATION DEADLINE TO FILL TRUSTEE AREA 7: DISCUSSION/ ACTION**

At the April 19, 2017 Board Meeting, Trustee Lynn Hatton-Hodson formally announced her resignation from the Board of Trustees effective Friday, June 2, 2017. Pursuant to Education Code § 5090-5095, the resignation necessitates action be taken by the Board of Trustees within 60 days of the vacancy to make a provisional appointment or call for a special election. During the May 10, 2017 Board meeting, Trustees voted to make a provisional appointment. The District notified the public and made an application available to individuals interested in filling the vacancy. The deadline for application submissions was Wednesday, May 17, 2017 by 12:00p.m. The Board will discuss and take action to extend the candidate application deadline to Tuesday, May 30, 2017 by 12:00p.m.

***CUSD WIG 2: Communications – Communicate with, and engage students, parents, employees, and community members in Districtwide and community-specific decisions.***

***Contact: Kirsten M. Vital, Superintendent***

**Staff Recommendation**

It is recommended the Board President recognize Kirsten M. Vital, Superintendent, to present information on this item and answer any questions Trustees may have.

Following discussion, it is recommended the Board of Trustees take action to extend the candidate application deadline to Tuesday, May 30, 2017 by 12:00p.m.

Motion by \_\_\_\_\_ Seconded by \_\_\_\_\_

**2. INTERVIEW OF CANDIDATE(S) FOR VACANCY WITHIN TRUSTEE AREA 7: INFORMATION/ DISCUSSION**

At the April 19, 2017 Board Meeting, Trustee Lynn Hatton-Hodson formally announced her resignation from the Board of Trustees effective Friday, June 2, 2017. Pursuant to Education Code § 5090-5095, the resignation necessitates action be taken by the Board of Trustees within 60 days of the vacancy to make a provisional appointment or call for a special election. During the May 10, 2017 Board meeting, Trustees voted to make a

Page 1  
**EXHIBIT 2**

provisional appointment. The District notified the public and made an application available to individuals interested in filling the vacancy. The deadline for application submissions was Wednesday, May 17, 2017 by 12:00p.m. Supporting documentation is located in Exhibit 2.

***CUSD WIG 2: Communications – Communicate with, and engage students, parents, employees, and community members in Districtwide and community-specific decisions.***

***Contact: Kirsten M. Vital, Superintendent***

Staff Recommendation

It is recommended the Board President recognize Kirsten M. Vital, Superintendent, to present information on this item and answer any questions Trustees may have. This is an information item only and no Board action is necessary.

**3. SELECTION OF APPOINTEE FOR TRUSTEE AREA 7:**

DISCUSSION/  
ACTION

At the April 19, 2017 Board Meeting, Trustee Lynn Hatton-Hodson formally announced her resignation from the Board of Trustees effective Friday, June 2, 2017. Pursuant to Education Code § 5090-5095, the resignation necessitates action be taken by the Board of Trustees within 60 days of the vacancy to make a provisional appointment or call for a special election. During the May 10, 2017 Board meeting, Trustees voted to make a provisional appointment. The District notified the public and made an application available to individuals interested in filling the vacancy. The Board has interviewed the potential candidates and will take action to appoint a Board member for Trustee Area 7.

***CUSD WIG 2: Communications – Communicate with, and engage students, parents, employees, and community members in Districtwide and community-specific decisions.***

***Contact: Kirsten M. Vital, Superintendent***

Staff Recommendation

It is recommended the Board President recognize Kirsten M. Vital, Superintendent to present this item.

Following discussion, it is recommended the Board of Trustees take action to nominate and appoint a provisional Board member for Trustee Area 7.

Motion by \_\_\_\_\_ Seconded by \_\_\_\_\_

**ADJOURNMENT**

Motion by \_\_\_\_\_ Seconded by \_\_\_\_\_

**THE NEXT REGULAR MEETING OF THE BOARD OF TRUSTEES IS  
WEDNESDAY, MAY 24, 2017, 7:00 P.M.  
AT THE CAPISTRANO UNIFIED SCHOOL DISTRICT OFFICE BOARD ROOM  
33122 VALLE ROAD, SAN JUAN CAPISTRANO, CALIFORNIA**

For information regarding Capistrano Unified School District, please visit our website:

[www.capousd.org](http://www.capousd.org)

## **INSTRUCTIONS FOR PRESENTATIONS TO THE BOARD BY PARENTS AND CITIZENS PRESENT AT THIS MEETING**

We are pleased you can be with us at this meeting, and we hope you will return often. Your visit assures us of continuing community interest in our schools.

The members of the Board of Trustees of this District are locally elected state officials, who serve four-year terms of office, and who are responsible for the educational program of our community from grades kindergarten through twelve. They are required to conduct programs of the schools in accordance with the State of California Constitution, the State Education Code, and other laws relating to schools enacted by the Legislature, and policies and procedures which this Board adopts.

The Board is a policy-making body whose actions are guided by the school district's Mission and Goals. Administration of the District is delegated to a professional administrative staff headed by the Superintendent.

The agenda and its extensive background material are studied by each member of the Board for at least two days preceding the meeting. Board Members can call the administrative staff for clarification on any item, and many of the items on the agenda were discussed by the Board during previous meetings. These procedures enable the Board to act more effectively on agenda items than would otherwise be possible.

### **WHAT TO DO IF YOU WISH TO ADDRESS THE BOARD OF TRUSTEES**

**ITEMS ON THE AGENDA.** Any person may address the Board concerning any item on the agenda and may, at the discretion of the Board, be granted three (3) minutes to make a presentation to the Board at the time a specific item is under discussion. However, the time assigned for individual presentations could be fewer than three (3) minutes depending upon the total number of speakers who wish to address a specific agenda topic. Prior to the opening of the meeting, a Request to Address the Board card (located in the foyer) should be completed and submitted to the Secretary of the Board. The total time devoted to presentations to the Board shall not exceed twenty (20) minutes, unless additional time is granted by the Board. All presentations shall be heard by the Board prior to the formal discussion of the agenda topic under consideration. Once an agenda item has been opened for public comment, no additional "Request to Address the Board of Trustees" cards shall be accepted for that topic.

**ORAL COMMUNICATIONS (Non-Agenda Items).** Citizens may address the Board on any item not appearing on the agenda. Individual presentations are limited to three (3) minutes per individual, with twenty (20) minutes in total being devoted for this purpose, but could be less if there are a large number of Oral Communication speakers. Legally, the Board may not take action on items raised by speakers under Oral Communications. However, at its discretion, the Board may refer items to the administration for follow-up or place topics on a future Board agenda.

**PUBLIC HEARINGS.** Anytime the Board schedules a separate public hearing on any given topic, it shall not hear speakers on that topic before the public hearing, except as to the scheduling of the hearing, nor shall it hear speakers after the hearing, except as to changes in the policy or recommended actions which are directed at the time of the hearing.

**CLOSED SESSION.** In accordance with Education Code § 35146 and Government Code § 54957, the Board may recess to Closed Session to discuss personnel matters which they consider inadvisable to take up in a public meeting.

#### **REASONABLE ACCOMMODATION**

*In order to help ensure participation in the meeting of disabled individuals, appropriate disability-related accommodations or modifications shall be provided by the Board, upon request, in accordance with the Americans with Disabilities Act (ADA). Persons with a disability who require a disability-related accommodation or modification, including auxiliary aids and services in order to participate in a Board meeting, shall contact the Superintendent or designee in writing by noon on the Friday before the scheduled meeting. Such notification shall provide school district personnel time to make reasonable arrangements to assure accessibility to the meeting.*

CAPISTRANO UNIFIED SCHOOL DISTRICT  
San Juan Capistrano, California

May 23, 2017

**INTERVIEW OF CANDIDATE(S) FOR VACANCY WITHIN TRUSTEE AREA 7**

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Candidate Application for Judy Bullockus.



**AREA 7 TRUSTEE CANDIDATE APPLICATION  
LETTER OF INTEREST TO THE BOARD OF TRUSTEES**

Capistrano Unified School District

Please complete and return by **12:00 p.m. Wednesday, May 17, 2017** to Nicole Perez,  
Executive Secretary, Board Operations (nmperez@capousd.org), or leave at the Superintendent's  
office located at 33122 Valle Road, in San Juan Capistrano.

Date: May 16, 2017

BULLOCKUS, JUDY L.  
(Last Name) (First Name), (Initial)

Business Address: SAME AS BELOW Phone: 949.735.3264

Home Address: 27401 CARINO CIRCLE Phone: 949.454.2210

E-mail: bullockus@cox.net

Occupation and Employer: Self employed - Marketing / Special Events

No. of Years Residing in the District: 22 yrs.

Do you have children in CUSD schools? Yes ☒ No ☐

If yes, what schools? CAPISTRANO VALLEY H.S.

In no more than five pages, please consider including information on any prior experience serving on a governing board, specifically a school district board, any school committees or participation in any school activities as well as role in any community or business activities. Also, please describe why you desire to serve as a school board member, what you view as the basic purpose of public schools, how your work as a Board member would fulfill this purpose and how the role of a Board member is different than the role of the Superintendent. Describe how you define the relationship between Board members and the District's administration in the handling of school concerns, your commitment to public education, what you view as the area(s) needing the most improvement in CUSD and what you believe are the strengths of the Capistrano Unified School District.

**Judy L. Bullockus**

27401 Carino Circle, Mission Viejo, CA 92692

(949) 454-2210 email: [bullockus@cox.net](mailto:bullockus@cox.net)

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May 16, 2017

Dear CUSD Trustees:

I am seeking an interest in your vote to appoint me to your board as trustee representing area seven. Just as I have been a community champion for the city of Mission Viejo, I desire to champion public education in our district. My husband and I both attended public schools and we believed in public schools for our two children. There are great lessons for youth beyond curriculum in public schools; they are the windows into the future working world as adults. In this role I would be partaking in the goal to prepare students for college, the workplace, and above all, leading a satisfying and productive life.

I believe the most important responsibility of school boards is to work with the community to improve student achievement in our local public schools. I would work with board members to develop and adopt policies, curriculum, and a budget. We are tasked to oversee facility issues and adopt collective bargaining agreements.

My understanding of the difference between a school board and the superintendent responsibilities is the board governs and the superintendent administers the school district. Boards are elected by the community to set priorities, establish policies and evaluate the outcomes of district operation. Superintendents identify needs and policies, develop regulations, provide leadership, and manage the day-to-day operation of the district.

The school board is the final authority in the district. Since the board can only act as a group it confers to the superintendent sufficient legal authority to implement the board's policies and run the day-to-day operations of the district.

The superintendent serves as the board's chief adviser on educational matters and as the district's educational leader. She is responsible for ensuring the board is informed about district operations and activities, and about the district's needs. The superintendent should ensure sufficient information is provided to the board so it is able to make informed decisions and evaluate the results of those decisions.

I would presume the relationship of board members with district administration is much like my experience as a city commissioner working with city staff. Staffs have expertise in their area of responsibility and act as advisers to assist board members with answering questions or sharing pertinent information. Both are respectful of one another and energies should be collaborative.

Strength in CUSD is the innovative educational experiences being offered such as ATMS and STEM Pathway at Capistrano Valley High School. Our sophomore son is in this program and we think it's an incredible experience for students. I'd like to see more of our schools able to provide this same opportunity. CAPO Forward, Future Scientists and Engineers of America and Health and Medical Occupations Academy and Kaiser Permanente Internship Program are all strong additions to our educational offerings. These real world applications excite and motivate students.

As for areas requiring the most improvement, we need to continue addressing and prioritizing facility maintenance, repairs and renovations in a timely fashion with identifying a means to cover costs. Additionally, seek alternative ways to better communicate CUSD success stories to garner greater community support in working collaboratively to provide the best educational experience with successful student outcomes.

As someone who is entrenched in the community and a long time volunteer with various youth organizations, I believe I would add value to the current board of trustees to represent area 7 schools and communities.

Sincerely,

  
Judy Bullockus

**JUDY L. BULLOCKUS**  
27401 Carino Circle  
Mission Viejo, California 92692  
H (949) 454-2210 • C (949) 735-3264  
Email: bullockus@cox.net

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## **OBJECTIVE**

Opportunity to serve as Capistrano Unified School District Trustee representing Area 7 to continue unwavering commitment to student achievement and well-being. Be a community champion for CUSD and develop a stronger relationship with constituents. Develop collaborative relationships as a new board member, establishing respect and professional climate inside the board and across the community.

## **PROFESSIONAL BACKGROUND**

Results oriented person with strong skills in communication, negotiation and design/implementation of operational efficiencies to improve company earnings. Expertise in customer service, relationship building, sales and event promotion, troubleshooting, client development programs, and motivating people to achieve organizational goals.

### **BULLOCKUS MARKETING CONSULTANT (2012 - Present)**

*Consumer Marketing Retail Centers & Special Events Coordination*

### **SIMON PROPERTY GROUP (1998 – 2001)**

*Marketing Director, The Shops at Mission Viejo*

### **SAKS FIFTH AVENUE (1979 – 1997)**

*General Manager, South Coast Plaza (1994-1997)*

*Assistant General Manager Merchandising & Operations, Mission Valley Center (1989-1994)*

*Department Manager, Beverly Hills (1984-1989)*

*Sales, Woodland Hills Promenade (1979-1984)*

## **SCHOOL INVOLVEMENT**

- Active PTSA Member 2013 – Present
  - Bathgate Turn Off TV Week – Developed Program & Chaired 2009 – 2012
  - Bathgate Earth Day Celebration - Initiated & Chaired 2010
    - Negotiated Wyland Mobile Learning Center @ no cost to school
- Bathgate Elementary School Foundation (BESF) – Original Founding Committee Member
  - Initiated & Chaired Dining Fundraising Club 2010 - 2012
  - Initiated Family Legacy Tile Wall 2011
    - Fundraiser for Science Camp
    - Coordinated PTSA to “Gift” each Teacher a tile to decorate during Teacher Appreciation Week
    - Coordinated & Oversaw all painting sessions for 564 Tiles
    - Handpainted Bathgate Blazer logo for wall centerpiece
- Coordinated Bathgate Class of 2012 Thank You Gift - Inspirational Sayings Tile Wall Border
  - Hosted students @ home to paint tiles for installation before school resumed in fall



- Bathgate Room Mom All 5 Years for Both Children 2006 – 2012
- Bathgate Science Camp Committee Member – Fundraising Chair 2011 - 2012
- Newhart Middle School Music Program Volunteer – 2012 – 2015
  - Measured students for tuxedo shirts and long dresses
- Capistrano Valley High School Aquatic Board Member 2016 – 2017
  - Girls Aquatic Banquet Chair 2015 & 2017
  - Snack Bar Volunteer 2014 - 2017
- Instrumental Music Marketing Chair 2017
- Cross Country and Track & Field Parent Volunteer 2016 – 2017

## **COMMUNITY ENGAGEMENT**

### **COMMUNITY SERVICE COMMISSIONER CITY OF MISSION VIEJO** *(2013 – Present)*

- Elephant Parade Welcome to America Dana Point – Open-Air International Art Exhibit 2013
  - Presented CUSD opportunity for 35 elementary schools to participate in elephant art contest and receive Awareness of Asian Elephant Plight & Education Program.
  - Coordinated 26 schools and 857 students participating with 200 student finalist receiving an art box to paint 3-dimensional 15cm elephants.
  - Engaged Visual Arts teacher to recreate student winner's design on 5' 3-dimensional elephant to be auctioned at public fundraiser.
- Joint Venture between Capistrano School District and Simon Youth Foundation (SPG) 1999
  - Negotiated space in The Shops at Mission Viejo shopping center to provide CUSD workable space to meet with home schooled families, current home of Futureology.
- Hugh O'Brien Youth Foundation (HOBY) 2014 - Present
  - Mentor, Parent Volunteer & Speaker at annual youth leadership seminar held at Chapman University.
  - Scholarship Coordinator with Civic Service Groups
- Boy & Girl Scouts 2006 – Present
  - Girl Scout Troop Leader for Juniors 2009 - 2010
  - Saddleback 6 District Registrar 2009 – 2013
  - Parent Volunteer 2006 - Present

## **AWARDS**

- Bathgate PTSA Honorary Service Award 2012
- Girl Scout Orange Owl Award 2011 *(Consistent, outstanding service to Girl Scouting)*
- Award of Excellence 1999 *(Marketing contribution to Simon Property Group)*
- Award of Excellence 1999 *(Region's highest income generated through customer loyalty program)*

**STATEMENT OF ECONOMIC INTERESTS**  
**COVER PAGE**

Date Initial Filing Received  
Official Use Only

Please type or print in ink.

NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
BULLOCKUS	JUDY	LYNN

**1. Office, Agency, or Court**

Agency Name (Do not use acronyms)

CAPISTRANO UNIFIED SCHOOL DISTRICT

Division, Board, Department, District, if applicable

TRUSTEE BOARD

Your Position

BOARD MEMBER

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

**2. Jurisdiction of Office (Check at least one box)**

- |   |   |
|---|---|
| <input type="checkbox"/> State              | <input type="checkbox"/> Judge or Court Commissioner (Statewide Jurisdiction) |
| <input type="checkbox"/> Multi-County _____ | <input checked="" type="checkbox"/> County of <u>ORANGE</u>                   |
| <input type="checkbox"/> City of _____      | <input type="checkbox"/> Other _____  |

**3. Type of Statement (Check at least one box)**

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> <b>Annual:</b> The period covered is January 1, 2016, through December 31, 2016. | <input type="checkbox"/> <b>Leaving Office:</b> Date Left ____/____/____<br>(Check one)             |
| <b>-or-</b>  | <input type="checkbox"/> The period covered is January 1, 2016, through the date of leaving office. |
| The period covered is ____/____/____, through December 31, 2016.   | <b>-or-</b>   |
| <input type="checkbox"/> <b>Assuming Office:</b> Date assumed ____/____/____   | <input type="checkbox"/> The period covered is ____/____/____, through the date of leaving office.  |
| <input type="checkbox"/> <b>Candidate:</b> Election year _____ and office sought, if different than Part 1: _____    |   |

**4. Schedule Summary (must complete) ► Total number of pages including this cover page: \_\_\_\_\_**

**Schedules attached**

- |   |  |
|---|--|
| <input type="checkbox"/> <b>Schedule A-1 - Investments</b> – schedule attached            | <input type="checkbox"/> <b>Schedule C - Income, Loans, &amp; Business Positions</b> – schedule attached |
| <input type="checkbox"/> <b>Schedule A-2 - Investments</b> – schedule attached            | <input type="checkbox"/> <b>Schedule D - Income – Gifts</b> – schedule attached                          |
| <input checked="" type="checkbox"/> <b>Schedule B - Real Property</b> – schedule attached | <input type="checkbox"/> <b>Schedule E - Income – Gifts – Travel Payments</b> – schedule attached        |

**-or-**

☐ **None - No reportable interests on any schedule**

**5. Verification**

MAILING ADDRESS (Business or Agency Address Recommended - Public Document)	STREET	CITY	STATE	ZIP CODE
27401 CARINO CIRCLE	MISSION VIEJO	CA	92692	
DAYTIME TELEPHONE NUMBER		E-MAIL ADDRESS		
( 949 ) 454-2210		bullockus@cox.net		

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 05/16/2017  
(month, day, year)

Signature Judy X. Bullockus  
(File the originally signed statement with your filing official.)

**SCHEDULE B**  
**Interests in Real Property**  
(Including Rental Income)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name

JUDY L. BULLOCKUS

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

25835 Marguerite Parkway #23

CITY

Mission Viejo, CA 92691

FAIR MARKET VALUE

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☒ \$100,001 - \$1,000,000

☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/16      \_\_\_\_/\_\_\_\_/16  
ACQUIRED      DISPOSED

NATURE OF INTEREST

☒ Ownership/Deed of Trust

☐ Easement

☐ Leasehold

Yrs. remaining

☐

Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

☐ \$0 - \$499

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☒ \$10,001 - \$100,000

☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

Emiliano David Andrade-Perez &

Patricia Pitallo-Suarez

► ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

26348 Via Roble #24

CITY

Mission Viejo, CA 92691

FAIR MARKET VALUE

☐ \$2,000 - \$10,000

☐ \$10,001 - \$100,000

☒ \$100,001 - \$1,000,000

☐ Over \$1,000,000

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/16      \_\_\_\_/\_\_\_\_/16  
ACQUIRED      DISPOSED

NATURE OF INTEREST

☒ Ownership/Deed of Trust

☐ Easement

☐ Leasehold

Yrs. remaining

☐

Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED

☐ \$0 - \$499

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☒ \$10,001 - \$100,000

☐ OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.

☐ None

Justin Hauser

\* You are not required to report loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER\*

N/A

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

\_\_\_\_\_%      ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

☐ OVER \$100,000

☐ Guarantor, if applicable

NAME OF LENDER\*

N/A

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE

TERM (Months/Years)

\_\_\_\_\_%      ☐ None

HIGHEST BALANCE DURING REPORTING PERIOD

☐ \$500 - \$1,000

☐ \$1,001 - \$10,000

☐ \$10,001 - \$100,000

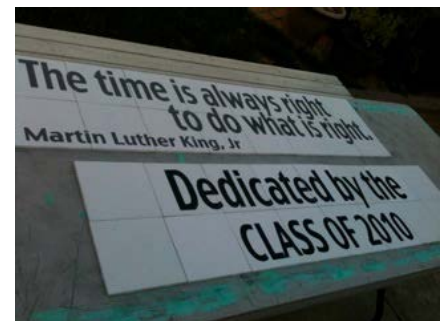
☐ OVER \$100,000

☐ Guarantor, if applicable

Comments:



**This is the difference Judy Bullockus makes in our schools.**





CAPISTRANO UNIFIED SCHOOL DISTRICT  
San Juan Capistrano, California

May 23, 2017

**INTERVIEW OF CANDIDATE(S) FOR VACANCY WITHIN TRUSTEE AREA 7**

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Candidate Application for Penny Davis-Esterman.

**AREA 7 TRUSTEE CANDIDATE APPLICATION  
LETTER OF INTEREST TO THE BOARD OF TRUSTEES**

Capistrano Unified School District

Please complete and return by **12:00 p.m. Wednesday, May 17, 2017** to Nicole Perez,  
Executive Secretary, Board Operations (nmperez@capousd.org), or leave at the Superintendent's  
office located at 33122 Valle Road, in San Juan Capistrano.

Date: 5/17/2017  
DAVIS-ESTERMAN, Penny S.  
(Last Name) (First Name), (Initial)  
Business Address: N/A Phone: —  
Home Address: 26184 Palomares Phone: 714-813-4366  
MISSION VIEJO 92692  
E-mail: 1pennyinca@gmail.com  
Occupation and Employer: Retired Teacher (as of 5/26/2017)  
No. of Years Residing in the District: 4  
Do you have children in CUSD schools? Yes — No ✓  
If yes, what schools? —

In no more than five pages, please consider including information on any prior experience serving on a governing board, specifically a school district board, any school committees or participation in any school activities as well as role in any community or business activities. Also, please describe why you desire to serve as a school board member, what you view as the basic purpose of public schools, how your work as a Board member would fulfill this purpose and how the role of a Board member is different than the role of the Superintendent. Describe how you define the relationship between Board members and the District's administration in the handling of school concerns, your commitment to public education, what you view as the area(s) needing the most improvement in CUSD and what you believe are the strengths of the Capistrano Unified School District.



# Penny Davis-Esterman

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26184 Palomares, Mission Viejo CA 92692 | 714-813-4366 | 1pennyinca@gmail.com

May 17, 2017

Board of Trustees  
Capistrano Unified School District  
33122 Valle Road  
San Juan Capistrano, CA 92675

Dear Board of Trustees:

My name is Penny Davis-Esterman, and I am submitting my application and résumé for your consideration for the provisional appointment of CUSD Trustee Area 7. As a soon to be retired high school teacher, I have spent the last thirty-three years committed to improving public education. As a member of the CUSD Board of Trustees, I will assist students to receive the highest quality education possible. This means ensuring students have full access to meeting the state's subject matter requirements for attending a four-year college, ensuring students graduating from CUSD are ready for college level work., and that students are ready to compete in today's competitive job market.

Public education must serve the needs of the community. As a school board member, I will ensure that community members are heard. A successful School Board communicates with the Superintendent as well as the District's administration on an ongoing basis. While the Superintendent is responsible for the day-to-day operations of the District, the School Board ensures that the policies are consistent and achievable. Although CUSD has a track record for success, we need to stay current with our educational objectives to meet a global market. One example of the district's success is the offering of the Seal of Biliteracy. However, we need to do more to guarantee our students' success. Whether the goal is college or immediate employment after high school, students need programs that will lead to their reaching their ultimate goals.

Thank you for your time and consideration. If chosen as the Area 7 Trustee, I will be an asset to the School Board and the community it is designed to serve.

I look forward to hearing from you soon.

Sincerely,

A handwritten signature in black ink, appearing to read 'Penny Davis-Esterman', with a stylized, flowing script.

Penny Davis-Esterman



## EDUCATION

*MASTER OF SCIENCE IN INSTRUCTIONAL DESIGN AND TECHNOLOGY, 2005*  
California State Fullerton University, Fullerton, CA

*GRADUATE PROGRAM, SINGLE SUBJECT CREDENTIAL IN ENGLISH, 1985*  
San Diego State University, San Diego, CA

*BACHELOR OF ARTS DEGREE IN SPEECH COMMUNICATION, 1983*  
San Diego State University, San Diego, CA

## SCHOOL COMMITTEES AND LEADERSHIP ROLES

*English Learner Chairperson (Anaheim High School)*

*INTEL Master Teacher - Intel Teach the Future Program (Anaheim High School)*

*WASC Focus Group - Accountability & Assessment (Anaheim High School)*

*Reclassification Committee Member (Anaheim High School)*

*Mentor Teacher - ESL Institute (OTAN), Los Angeles (Bassett Adult School)*

## EMPLOYMENT HISTORY

*EL (ENGLISH LEARNER) CHAIR*

*ENGLISH & ELD (ENGLISH LANGUAGE DEVELOPMENT) TEACHER*

Anaheim High School, Anaheim, CA (9/1996 - 5/2017)

In addition to Department Chair responsibilities, current teaching assignment:  
ELD 1 / ELD 2 (Beginning / Intermediate English-as-a-Second Language) and  
Freshman English. Curriculum Committee Member to revise English curriculum  
based on the new California Common Core Standards. Previous assignments:  
Speech, Theater Arts, Mock Trial, all levels of ELD, and English support classes.

*ENGLISH INSTRUCTOR*

Coastline Community College, Fountain Valley, CA (9/1994 - 12/1913)

Various locations. Taught college credit developmental writing and basic skills  
classes in the traditional classroom and through the Distance Learning  
Department online to help prepare native and non-native speakers of English  
(ESL) for Freshman Composition. Student Success Center/Basic Skills Center  
English Tutor.

*ESL (ENGLISH-AS-A-SECOND LANGUAGE) INSTRUCTOR*

Goldenwest College, Huntington Beach, CA (1/1990 - 1/1992)

Taught various college credit development writing classes in the traditional  
classroom to help prepare native and non-native speakers of English (ESL) for  
Freshman Composition.



### ***DEPARTMENT CHAIR – ESL/ABE***

Bassett Adult School, La Puente, CA (7/1991 – 7/1996)

Positions included Program Specialist/Department Chair for English-as-a-Second Language (ESL), Adult Basic Education (ABE), Citizenship, and Federal Jobs Programs (JTPA/GAIN). Principal Designee, Bassett Adult School Management Team Member. Previous Revised ESL curriculum to align to ESL Model Standards, and wrote various curriculum for ESL. OTAN Mentor Teacher. Previous assignments included ESL, ABE, and Citizenship instructor.

### ***ESL/VESL INSTRUCTOR, ADULT EDUCATION DEPARTMENT***

North Orange County Community College District, Fullerton, CA (6/1986–6/1991)

Various locations: Adult Education English-as-a-Second Language (ESL) and Vocational ESL assignments; Developed curriculum.

### ***ESL/VESL INSTRUCTOR, CONTINUING EDUCATION DIVISION***

Rancho Santiago Community College District, Santa Ana, CA (1/1988–9/1989)

Various locations: Continuing Education Division. English-as-a-Second Language (ESL) and Vocational ESL assignments.

### ***ESL INSTRUCTOR, ALTERNATIVE & CONTINUING EDUCATION***

Fullerton Joint Union High School District, Fullerton, CA (7/1986–6/1989)

Taught various levels of ESL in the noncredit program in Alternative and Continuing Education.

## **CREDENTIALS AND CERTIFICATES**

*California Single Subject Credential in English (Professional Clear)*

*California Community College Credential in Basic Education (Lifetime)*

*California Community College Credential in ESL, Remedial English (Lifetime)*

*Crosscultural, Language and Academic Development (CLAD) Certificate (Lifetime)*

## **TESTS**

*California Basic Educational Skills Test (CBEST)*

*Crosscultural, Language and Academic Development (CLAD)*

## **REFERENCES**

*Available upon request*

CAPISTRANO UNIFIED SCHOOL DISTRICT  
San Juan Capistrano, California

May 23, 2017

**INTERVIEW OF CANDIDATE(S) FOR VACANCY WITHIN TRUSTEE AREA 7**

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Candidate Application for Robert Dickson.



# CAPISTRANO UNIFIED SCHOOL DISTRICT

33122 VALLE ROAD, SAN JUAN CAPISTRANO CA 92675  
TELEPHONE: (949) 234-9200/FAX: 496-7681 [www.capousd.org](http://www.capousd.org)

## BOARD OF TRUSTEES

MARTHA MCNICHOLAS  
PRESIDENT

GILA JONES  
VICE PRESIDENT

PATRICIA HOLLOWAY  
CLERK

AMY HANACEK

LYNN HATTON-HODSON

GARY PRITCHARD, PH.D.

JIM REARDON

SUPERINTENDENT  
KIRSTEN M. VITAL

May 12, 2017

Dear CUSD Trustee Area 7 Candidate:

We appreciate your interest in serving as a Capistrano Unified School District Trustee representing Area 7, which covers portions of Rancho Santa Margarita, Mission Viejo, and Coto de Caza, including Arroyo Vista K-8 School, Bathgate Elementary School, Castille Elementary School, Philip Reilly Elementary School, Tijeras Creek Elementary School, Wagon Wheel Elementary School, Newhart Middle School, and Tesoro High School.

The Capistrano Unified School District is the highest performing large school district in California and is responsible for the education of 50,000 public school students in seven cities and unincorporated areas covering nearly 200 square miles of south Orange County. If you were to be appointed, you would represent Trustee Area 7 and serve as part of a 7-member Trustee team making policy in support of every student in our District.

The Board of Trustees' primary goal is to provide each student with an education of the highest quality. This goal is the primary factor motivating the Board's execution of its powers and duties. The Board is responsible for the general control and direction of education in the District and provides accountability to the students, families and communities we serve.

To apply for appointment to the Board of Trustees, you must meet the follow criteria, as required by Education Code section 35107:

- a. 18 years of age or older;
- b. A citizen of California;
- c. A resident of Trustee Area 7;
- d. A registered voter in Trustee Area 7;
- e. Not disqualified by the Constitution or laws of the state from holding a civil office

SERVING THE COMMUNITIES OF:

ALISO VIEJO • COTO DE CAZA • DANA POINT • LADERA RANCH • LAGUNA NIGUEL • LAS FLORES • MISSION VIEJO  
RANCHO MISSION VIEJO • RANCHO SANTA MARGARITA • SAN CLEMENTE • SAN JUAN CAPISTRANO



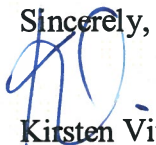
Page 2  
May 12, 2017  
Trustee Area 7 Candidate

With your application (attached to this document), please consider also including a resume, a Letter of Interest to the Board of Trustees and a phone number. It is also highly recommended that you complete the Fair Political Practices Commission Statements of Economic Interests (Form 700). Please go to the following URL for more information on the Form 700 process and responsibilities: <http://www.fppc.ca.gov/Form700.html>.

Each applicant and nominated individuals for provisional appointment will be interviewed by the Board of Trustees at a special public meeting on Tuesday, May 23, 2017 at 4:30 p.m. Please understand that all information you submit, including your resume, letter of interest to the Board of Trustees, phone number and Form 700 will become public documents once the District receives them. In addition, pursuant to the California Brown Act, all of the candidate interviews must be conducted in public, during an open meeting.

We appreciate your interest in serving the Capistrano Unified School District. Should you have any questions, please contact Ryan Burris, Chief Communications Officer, at (949) 234-9308.

Sincerely,



Kirsten Vital  
Superintendent

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Attachment: Application



**AREA 7 TRUSTEE CANDIDATE APPLICATION  
LETTER OF INTEREST TO THE BOARD OF TRUSTEES**

Capistrano Unified School District

Please complete and return by **12:00 p.m. Wednesday, May 17, 2017** to Nicole Perez,  
Executive Secretary, Board Operations (nmperez@capousd.org), or leave at the Superintendent's  
office located at 33122 Valle Road, in San Juan Capistrano.

Date: 14 May 2017

Dickson, Robert J  
(Last Name) (First Name), (Initial)

Business Address: 4125 E LaPalma Ave. Suite 250, Anaheim, Ca 92807 Phone: 714-333-3269

Home Address: 15 Sendero, Rancho Santa Margarita, Ca 92688 Phone: 404-661-5655

E-mail: micpad@gmail.com

Occupation and Employer: Director of Technical

No. of Years Residing in the District: 2

Do you have children in CUSD schools? Yes x No       

If yes, what schools? Arroyo Vista Elementary

In no more than five pages, please consider including information on any prior experience serving on a governing board, specifically a school district board, any school committees or participation in any school activities as well as role in any community or business activities. Also, please describe why you desire to serve as a school board member, what you view as the basic purpose of public schools, how your work as a Board member would fulfill this purpose and how the role of a Board member is different than the role of the Superintendent. Describe how you define the relationship between Board members and the District's administration in the handling of school concerns, your commitment to public education, what you view as the area(s) needing the most improvement in CUSD and what you believe are the strengths of the Capistrano Unified School District.

# ROBERT JAMES DICKSON

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15 Sendero, Rancho Santa Margarita, CA 92688

Cell: (404) 661-5655

micpad@gmail.com

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## EXECUTIVE PROFILE

Technical and R&D executive with a proven success of being innovative, working with lean processes, company focused and customer facing. Know how to defuse conflict while retaining the customer and balancing the company goals. Backed by a solid education (PhD, MS) and years of experience.

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## SKILL HIGHLIGHTS

- Leadership/Communication skills
- Product Development
- New Product Delivery
- Quality Control/Quality Assurance
- Remote Management
- Negotiation Expert
- Self-Motivated
- Customer-Oriented
- Project Manager
- Master Planning

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## CORE ACCOMPLISHMENTS

### *Project Management:*

- Initiated Product Retention Plan, to increase shelf-life from average of 1 year to 2 years, which resulted in net \$1 million savings to the company.
- Lead a Sample and Color Efficiency project to increase the productivity of the work being accomplished in the Sample and Color department from 50,000 samples a year to 76,000 with a reduction of staff and no loss of delivery times.
- Improved Quality and Service in the company by 30% reduction in claims over goods sold; which led to \$1.5 million in savings over the last 3 years.
- R&D Team developed 5 new products a year for the last 6 years; net sales for new products was 5% or more per product of total sales.

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## PROFESSIONAL EXPERIENCE

Director of Technical and R&D, 02/2012 to Current

Parex USA, Inc — Anaheim, CA

Executive Team member responsible for over-site of the R&D and Quality departments. Included Raw Material Offsets, New product Development, Competitive break-downs, and Formulations

- National AIA contact
- Merger and Acquisition Integration Team
- Gate Keeper for Formulations and Costing
- Company PMK (Person Most Knowledgeable) for legal claims
- Company Custodian of Records
- Risk Manager for labels, written documents
- Leads a team of 36 people.

Customer Service Director, 02/2016 to Current

PAREX USA, Inc. — Anaheim, CA

- Responsible for product orders and managing logistics of where the products are pulled in the network and to ensure they arrive on-time set by the customer.
- Customer base orders from 7 different brands and approx. 400 different customers USA based and Pacific-Asia. Average Order count 4000 per Month with less than 1 Average Error Rate per Month
- Master Planning to ensure all Orders are filled within the Customer Expectation
- Leads a team of 10 people.

Technical Manger, 12/2008 to 02/2012

Parex USA, Inc — Anaheim, Ca

- Integrated Facade and Flooring Technical Groups
- Created a mechanism for tracking internal and external claims; creating a process for root cause analysis
- Quality Control Audits for Production; ISO 9001
- Building Codes and Testing
- Managed Field Support Team

Black Belt - Lean Six Sigma, 02/2006 to 02/2008

HB FULLER - Specialty Construction Brands — Aurora, IL

- Developed and implemented projects that will add corporate value.
- Mentored 5 Green Belts
- Project: Implemented WMS - Warehouse Management Software/Program
- Project: New Packaging for Product Retention
- Project: Claim Handling improvement

Field Support Manager, 02/2005 to 02/2008

HB FULLER - Specialty Construction Brands — Aurora, IL

- Led the field technical advisors whose responsibilities are to work with the sales force to solve field problems, train customers, conduct field trials, manage claims, and help the sales force to manage their areas.
- Worked with sales in Georgia and North/South Carolina as a Technical Advisor.

Technical Field Advisor, 12/2002 to 12/2005

HB FULLER - Specialty Construction Brands — Aurora, IL

- Worked as Sales support and Customer Support on Products
- Claim investigation
- Education/Training program with customer
- Territory coverage was the South East USA, 8 States
- Grow Sales by promoting High End products
- Architectural Representative in Territory

Research Scientist, 02/2000 to 02/2002

Minerals Technology - Specialty Minerals Inc — Bethlehem, PA

- Research was concentrated in determining how experimental minerals will perform in paper coatings designed for Lithography printing type of applications.
- Led a synthesis team in making minerals for paper coatings, formulating coatings, and measuring print properties

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## EDUCATION

Ph.D.: Chemical Engineering Coated Papers, 1997

University of Maine — Orono, Maine, USA

Master of Science: Conflict Management, 2006

Kennesaw State University — Kennesaw, Georgia, USA

Certified Document Technologist, 2004

Construction Specification Institute

Bachelor of Science: Chemical Engineering, 1992

Georgia Institute of Technology — Atlanta, Georgia, USA

Certificate in Pulp and Paper

Publications and Presentations

Given and Published on 12 separate occasions. Been Member of Various Trade organizations. Liaison for ASTM and ANSI Committees.

14 May 2017

Nicole Perez ([nmperez@capousd.org](mailto:nmperez@capousd.org))  
Executive Secretary, Board Operations  
33122 Valle Road  
San Juan Capistrano, Ca 92675

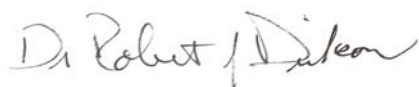
Re: Letter of Intent for the CUSD Board of Trustees Area 7

Dear Ms. Perez,

Thank you for receiving and passing on my information to the Superintendent's office for the Open position on the Board of Trustee Area 7. Below are the question and concerns in the announcement with my responses.

I appreciate the consideration of my application to fill the position. Please let me know the next step in the process. Look forward to talk with you and the others on my application for the position Thankyou

Sincerely,



Dr Robert J Dickson  
15 Sendero  
Rancho Santa Margarita, Ca 92688  
404-661-5655

**Prior Board Experience:**

During my career and life, I have been part of several different types of boards, Currently I am SAMLARC Board President (Largest HOA in California), ICC Board member (International Code Council for Building Industry), and University of Maine President's Board for 3 years.

The SAMLARC (Santa Margarita Landscape and Recreation Corporation) is the largest HOA in California. As the current Board President, plus 6 other board members, we are responsible for managing and maintaining a \$9 million budget, providing activities for residence, upkeep and improvements to 17 parks, and general programs for education and learning.

The ICC (International Code Council) board helps set objection for the staff as they evaluate company's products and services that will be used for the public. These objections and goals ensure the best and highest level of quality and safety are used for products/construction assemblies.

As a member of the University of Maine's President's board, it was the goal of this board to help give strategy and direction for the university system. The main goal for the position was to connect the

public that lived around the campus with the school President, to keep all interest and concerns of the school and community in mind.

### **Why you desire to serve as School Board Member**

Education is very important to me and that education for the kids that will be the future leaders of companies and governments. Being part of a school board that will help set the strategy for a changing and diverse world for the next 1 (short term), 3 to 5 (long term) years is very important and exciting that will add awareness and opportunities.

### **Basic Purpose of Public Schools and How your work as a Board member would fulfill this purpose**

Purpose of Public schools is to offer an equal and fair school system that can be given to all kids of any type of diversity; making them feel equal and safe to each other while providing them with the best education for success now and in the future. By being a Board member, I can help bring that direction and give input from my own background and knowledge that has been gain from the different places that I have worked, lived, and played, while being an advocate through the board for the students to succeed, and holding everyone accountable for their part of education.

### **How the role of a Board member is different than the role of the Superintendent**

The role of the Board member is to give direction and strategy to the District while the Superintendent carries out and implements the day to day work.

### **Define the relationship between Board members and the District's administration in handling of school concerns**

Depending on the matter, the District's administration handles the school concerns from a day to day activity. If the matter needs to become or is an overall policy affecting many schools, then the board take actions at a district level.

### **Commitment to Public education**

With a PhD and Masters, I have attended public schools all my life. Personally, I am committed to provide and push public education to all, stressing the need to be accountable for the schools to teach and educate our kids to succeed now and in the future when they graduate from High School.

### **What are the areas of needing the most improvement in CUSD**

CUSD is a great place to send kids to school but as in all places there is always room for improvement. From what I see for improvement, is a consistent message that the schools give the kids. The consistency will keep the kids grounded; providing them with a sense of security and comfort. Another area of improvement is for the staff at the school to be supported and to feel support in their jobs.

### **Strengths of the Capo District**

The Capistrano Unified School District is a district that is full of wealth, heritage, and life. The kids and teachers are committed to each other. This will not be possible if the Board was not unified and committed to the region.

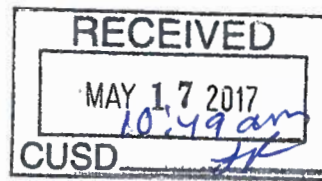
CAPISTRANO UNIFIED SCHOOL DISTRICT  
San Juan Capistrano, California

May 23, 2017

**INTERVIEW OF CANDIDATE(S) FOR VACANCY WITHIN TRUSTEE AREA 7**

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Candidate Application for Sara Jocham.



**AREA 7 TRUSTEE CANDIDATE APPLICATION  
LETTER OF INTEREST TO THE BOARD OF TRUSTEES**

Capistrano Unified School District

Please complete and return by **12:00 p.m. Wednesday, May 17, 2017** to Nicole Perez,  
Executive Secretary, Board Operations (nmperez@capousd.org), or leave at the Superintendent's  
office located at 33122 Valle Road, in San Juan Capistrano.

Date: 5-17-17

Jocham, Sara, R.  
(Last Name) (First Name), (Initial)

Business Address: 2985 Bear Street Phone: 714 424-5059  
Costa Mesa, CA 92626

Home Address: 26 Calle Bella, Rancho Phone: 714-308-6585  
Santa Margarita, CA 92688

E-mail: Sara.jocham@yahoo.com

Occupation and Employer: Assistant Superintendent, Newport-Mesa  
Unified

No. of Years Residing in the District: 6

Do you have children in CUSD schools? Yes ☒ No ☐

If yes, what schools? Newhart, Tesoro

In no more than five pages, please consider including information on any prior experience serving on a governing board, specifically a school district board, any school committees or participation in any school activities as well as role in any community or business activities. Also, please describe why you desire to serve as a school board member, what you view as the basic purpose of public schools, how your work as a Board member would fulfill this purpose and how the role of a Board member is different than the role of the Superintendent. Describe how you define the relationship between Board members and the District's administration in the handling of school concerns, your commitment to public education, what you view as the area(s) needing the most improvement in CUSD and what you believe are the strengths of the Capistrano Unified School District.



Sara R. Jocham  
26 Calle Bella, Rancho Santa Margarita, CA 92688  
Cell: (714) 308-6585 Office: (714)424-5059  
Email: sara.jocham@yahoo.com

May 17, 2017

Capistrano Unified School District  
33122 Valle Road  
San Juan Capistrano, CA 92675

To Whom It May Concern:

Please accept this letter as an expression of my interest in serving as a Capistrano Unified School District (CUSD) Trustee for Area 7. I meet the required criteria in order to be eligible for appointment to the Board of Trustees. My twenty-six years of experience in public school education, including eighteen years, as an administrator, with four of those years as an Assistant Superintendent for Capistrano Unified School District, has allowed me to develop skills and expertise which would be beneficial as a Trustee within CUSD.

After starting my career as a public school speech pathologist in Norwalk-La Mirada Unified School District, I began my administrative career working for nine years in Long Beach Unified School District with various administrative positions. I expanded my knowledge of school districts and boards of education when I worked for three years as a Special Education Local Plan Area (SELPA) director for a large multi-district SELPA. I worked closely with the Superintendents and staff of ten school districts and learned a great deal about the dynamics between a school board and a superintendent. I then worked as Assistant Superintendent of Special Education in CUSD for four years. During this time I had the opportunity to work closely with the Superintendent as a member of Executive Cabinet and work closely with the Board of Trustees in the mission of the district. My current work as the Assistant Superintendent of Student Support Services in Newport-Mesa Unified School District provides me the opportunity to oversee many aspects of district life including; student discipline, restorative culture, health services, special education, foster, and homeless youth.

I am a leader in statewide organizations, including my current role as the co-chair of the SELPA Finance Committee and SELPA Steering Committee member. The State Board of Education recently re-appointed me for a second term as a Commissioner on the statewide Advisory Commission for Special Education. I participated as a member of the statewide Taskforce on Special Education looking for the best ways to reform special education. I am part of the state Maintenance of Effort Workgroup and the Coalition for Adequate Funding for Special Education.

In addition to my professional education-related experience, I am the mother of two children who have attended school within CUSD since 2011. This has allowed me to stay current on things happening in the district. I am a problem-solver, trained in conflict resolution and have the ability to tackle difficult situations in a calm manner. I have a strong commitment to public education and stewardship of public money and am excited to serve the district and the local community through this opportunity.

I can be reached at the contact information provided above. Thank you in advance for your consideration.



Sara Jocham

**Sara R. Jocham**  
 26 Calle Bella  
 Rancho Santa Margarita, CA 92688  
 Home: (714) 308-6585 Office: (714) 424-5059

**PROFESSIONAL HIGHLIGHTS:**

**Assistant Superintendent, Student Support Services, Newport-Mesa Unified School District, Costa Mesa, CA (July 2015-Present)**

- Direct all of the student service programs including: special education, health services, foster and homeless youth, community services, wraparound services, Discipline, PBIS and SARB
- Coach and build capacity within the Division to ensure success
- Develop strategic goals and objectives for all areas of student support services
- Consult with other district executive leadership staff to ensure program articulation and continuity

**Assistant Superintendent, Special Education Operations, SELPA, Capistrano Unified School District, San Juan Capistrano, CA (July 2011-June 2015)**

- Provided leadership and oversight of the educational program and budget for 5000 students with special needs
- Established a comprehensive educational mental health program
- Implemented collaborative relationships with parents and the community through the Community Advisory Committee
- Developed and presented reports and presentations to Board of Trustees and other groups

**Special Education Local Plan Area (SELPA) Director, East San Gabriel Valley, Covina, CA (August 2008- July 2011)**

- Managed a large multi-district SELPA of ten school districts and four charter schools educating over 100,000 students with 12,000 special education students
- Generated a new fiscal allocation plan which resulted in greater transparency and equity in funding
- Implemented an online IEP writing/data management system to increase compliance and efficiency
- Oversaw regional provider programs for students to ensure program quality and cost control
- Completed regional, state, and federal reports for personnel, program, fiscal, pupil count, transportation, and facilities

**Director of Special Education/SELPA, Long Beach Unified School District, Long Beach, CA (July 2006-August 2008)**

- Responsible for programs and services for over 7800 special education students preschool through age 22
- Collaborated with school Principals to ensure curriculum access and support for all students
- Participated in District and State budget planning, organization, and oversight
- Represented the District in developing and supporting special education legislation at the state and national level

**Due Process /Special Education Local Planning Area (SELPA) Program Administrator, Long Beach Unified School District, Long Beach, CA (March 2005-July 2006)**

- Represented the school district in all special education legal matters, including forty due process cases per year.
- Provided training on Federal/State special education legal mandates
- Negotiated, facilitated, and implemented over one hundred settlement agreements between parents and school district
- Created procedures for the inclusion of students with special needs into general education and community programs

**Administrator for Teaching and Learning, Long Beach Unified School District, Long Beach, CA (2002-2005)**

- Provided administrative support at 21 Elementary Schools with special education programs for preschool through fifth grade
- Developed in-district autism program resulting in significant cost savings to district
- Facilitated high profile IEP meetings using Facilitated IEP process (FIEP)
- Collaborated with general education school site personnel on curricular, behavioral, and program issues for special education students
- Analyzed data to make program and service delivery decisions

**Administrative Assistant, Long Beach Unified School District Office of Special Education, Long Beach, CA (1999-2002)**

- Provided oversight for district-wide preschool, autism, and inclusion programs
- Worked with the State Department of Education/Office for Civil Rights to investigate complaints, provide documentation of resolution, and implemented corrective action plans
- Represented the Assistant Superintendent in meetings with parents, District staff, State and local agencies, and community organizations

**Disabilities Services Liaison, Ramona Head Start, Norwalk-La Mirada Unified School District, Norwalk, CA (1994-1999)**

- Designed inclusion programs for preschool students in the least restrictive environment
- Collaborated with general education teachers on classroom management
- Managed disabilities budget, personnel, and staff development
- Participated in State and Federal grant writing projects to ensure program funding

**Speech Language Pathologist, Norwalk-La Mirada Unified School District, Norwalk, CA (1991-1999)**

- Evaluated over 80 students annually to determine eligibility for speech/language services
- Participated on multi-disciplinary team for evaluation and IEP team meetings for children to determine eligibility for District special education services
- Developed assessment reports, appropriate goals and objectives, therapy plan, and progress reports for all eligible students

## **PROFESSIONAL/COMMUNITY INVOLVEMENT**

- Commissioner – Advisory Commission for Special Education (2013-Present)
- Member of Statewide Special Education Task Force-Fiscal Subcommittee (2013-2015)
- State SELPA Co-Chairperson – Finance Committee (2007-Present)
- State Maintenance of Effort (MOE) Workgroup Member (2007-Present)
- Steering Committee Member –State SELPA Association (2007-Present)
- Steering Committee Member - Coalition for Adequate Funding for Special Education (2008-2011)
- Chairperson- Orange County SELPA Directors (2012-2013)
- Chairperson – Greater Los Angeles Area SELPA Directors (2006-2008)
- Early Childhood Leadership Directives Guide (2005-2006)
- Alternative Dispute Resolution Solutions Panel training (2004)
- Association of California School Administrators Presenter

## **EDUCATION:**

### **Azusa Pacific University: Azusa**

Doctoral Program, Educational Leadership

Estimated Completion Date: December 2017

### **California State University, Long Beach:**

Professional Administrative Services Credential

Preliminary Administrative Services Credential

### **California State University, Fullerton:**

Master of Arts in Communication Disorders

Clinical Rehabilitative Services Credential

### **Calvin College/Michigan State University:**

Bachelor of Science in Letters and Communication Disorders

## **CERTIFICATION:** Professional Administrative Services Credential

Clinical Rehabilitative Services Credential

## **REFERENCES:** Available Upon Request

## **Capistrano Unified School District Board of Trustees Appointment Information**

### **Experience on governing board, school board, school committees, and community activities**

The California State Board of Education appointed me as a Commissioner on the statewide Advisory Commission on Special Education (ACSE). I am currently serving my second four-year term in this position. The role of ACSE is to provide recommendations and advice to the State Board of Education, the State Superintendent of Public Instruction, the Legislature, and the Governor in new or continuing areas of research, program development and evaluation in California special education.

I was appointed to serve as a member of the fiscal subcommittee for the 2013-2015 Statewide Special Education Task Force researching and making recommendations on the best ways to reform special education.

I have served a co-chairperson of the Finance Committee for the Special Education Local Plan Area Association (SELPA) and a member of the SELPA Steering Committee since 2007. Through my role as a Finance Chairperson I have had the opportunity to work with staff from the Department of Finance, Legislative Analyst's Office, Public Policy Institute of California, and staff for members of the California legislature.

I have been on numerous school/district committees both as a parent and as a district employee.

### **Desire to serve as a school board member**

I have spent over 25 years working in public education. I have attended many board meetings and worked closely with many Board members throughout my career. I know how important it is to have a school board who works together, listens to each other, and is committed to improving the lives of students within the district. I know that the work of the school board member is not easy. It is much more than showing up to board meetings a couple of times per month. It is

commitment to making the school district the very best. It is time spent supporting schools, the community, athletics, arts, reviewing budgets, and listening and helping parents and students.

I desire to be a board member to ensure that my children and all the students within the district continue to receive an appropriate education with a commitment to high standards of accountability for academic achievement and student outcomes.

I support the vision of the District with an unwavering commitment to student success. I want to prepare students to meet the challenges of a rapidly changing world through meaningful, challenging, and innovative educational experiences.

It is time to take my skills, knowledge, and years of experience in public education and use them to serve the District and the community of Trustee Area 7.

### **Basic Purpose of Public Schools**

The purpose of public schools in the United States is to help students achieve or fulfill their potential. For many/most of the students within the District this will include preparing them for college and careers. However, for some students within the District their full potential may not be college. It may be a trade job, certificate of completion, or learning how to live independently. The role of the public school system is to provide students with the tools and training necessary for them to reach their potential. When this is accomplished, we as a society benefit by having a trained, educated workforce, critical thinkers and problem solvers, and good community members.

### **Board Work to Fulfill this Purpose**

As a school board member I would work to fulfill this purpose by ensuring a range of educational opportunities for all students. The District has done a great job of incorporating STEM/STEAM into the curriculum, improving the rigor and relevance of the academic work, and creating pathways for students interested in career technical education. I would support this work continuing within the District. Additional work needs to be done on improving the educational outcomes for English Language Learner students, foster students, and low socio-economic students. I would also advocate for additional job training/coaching/mentoring opportunities for students with special needs to help them reach their potential.

## **Role of Board Member versus Role of the Superintendent**

The easiest explanation for the different roles is that the Board of Education is responsible for the policy, establishing the “what” of the District. The Board of Education sets the direction or the course of the district. The role of the Superintendent is to take the “what” from the Board of Education and determine “how” to achieve it. The Board is also responsible for the fiscal oversight and stewardship of public funds.

## **Relationship between Board and District administrators on school concerns**

I have had many different relationships with school board members as a District administrator, both within CUSD and in other districts. It is important for a member of the school board to keep in mind that they employ the Superintendent and in directly communicating with District administrators about school concerns it may prevent the Superintendent from being able to do his/her job. The default is that all communication goes through the Superintendent’s office. This allows the Superintendent to know what information the Trustee is requesting or has concerns about and determine the appropriate staff member to handle that concern. There may be exceptions to this practice when Trustees directly communicate with District or site administration, but this should be guided by the Superintendent.

## **Commitment to Public Education**

I have worked in public education for over twenty-six year and have a deep and abiding commitment to public education. My children have always attended public schools and I value the education they have received.

## **Areas for Improvement in CUSD**

There is always a risk of a high-performing district to become complacent since the academic scores look good. There was recently a ranking by the Washington Post of America’s Most Challenging High Schools with the criteria of: the percentage of students taking the tests associated with the most challenging academic courses (AP and IB) *and* the percentage of graduates who passed at least one of these

exams. No schools from CUSD were on that list. We need to look for ways to have more students take more challenging AP, IB, and Honors courses.

Other areas of improvement for the District include: the development of a comprehensive plan to address aging facilities and creation of cost-effective, appropriate programs/services for students with special needs – special education, students with emotional and mental health needs, foster youth, and English Language Learners.

There also is room for improvement in the collaboration with the various cities within the District. The partnerships between the cities and the District could allow for a pooling of resources to provide enhanced opportunities for students.

### **Strengths of CUSD**

The strengths of CUSD are numerous. It was a great district to work in and it is a great district for my children to receive a quality education to prepare them for the future. Some of the top strengths of the District are:

- Dedicated/Smart Employees – certificated, classified, and administrators
- Involved Parents
- Knowledgeable/informed school board
- Community participation in the schools



STATEMENT OF ECONOMIC INTERESTS

Date Initial Filing Received  
Official Use Only

COVER PAGE

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)  
Jocham Sara Ruth

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Capistrano Unified School District

Division, Board, Department, District, if applicable

Board of Education

Your Position

Trustee

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_

Position: \_\_\_\_\_

2. Jurisdiction of Office (Check at least one box)

☒ State

☐ Judge or Court Commissioner (Statewide Jurisdiction)

☐ Multi-County \_\_\_\_\_

☐ County of \_\_\_\_\_

☐ City of \_\_\_\_\_

☐ Other \_\_\_\_\_

3. Type of Statement (Check at least one box)

☐ Annual: The period covered is January 1, 2015, through December 31, 2015.

-or-

The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_, through December 31, 2015.

☐ Leaving Office: Date Left \_\_\_\_/\_\_\_\_/\_\_\_\_  
(Check one)

☐ The period covered is January 1, 2015, through the date of leaving office.

-or-

☐ The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_, through the date of leaving office.

☒ Assuming Office: Date assumed \_\_\_\_/\_\_\_\_/\_\_\_\_

☐ Candidate: Election year \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_

4. Schedule Summary (must complete) ► Total number of pages including this cover page: \_\_\_\_\_

Schedules attached

☒ Schedule A-1 - Investments - schedule attached

☐ Schedule C - Income, Loans, & Business Positions - schedule attached

☐ Schedule A-2 - Investments - schedule attached

☐ Schedule D - Income - Gifts - schedule attached

☐ Schedule B - Real Property - schedule attached

☐ Schedule E - Income - Gifts - Travel Payments - schedule attached

-or-

☐ None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE

(Business or Agency Address Recommended - Public Document)

26 Calle Bella

Rancho Santa Margarita

CA

92688

DAYTIME TELEPHONE NUMBER

( 714 ) 308-6585

E-MAIL ADDRESS

sara.jocham@yahoo.com

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed

5-17-17

(month, day, year)

Signature



(File the originally signed statement with your filing official.)

FPPC Form 700 (2015/2016)

FPPC Advice Email: advice@fppc.ca.gov

FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

**CALIFORNIA FORM 700**  
**FAIR POLITICAL PRACTICES COMMISSION**

**Name**  
 Sara R. Jocham

► NAME OF BUSINESS ENTITY \_\_\_\_\_

GENERAL DESCRIPTION OF THIS BUSINESS \_\_\_\_\_

FAIR MARKET VALUE

☐ \$2,000 - \$10,000      ☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000      ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock      ☐ Other \_\_\_\_\_ (Describe)

☐ Partnership      ☐ Income Received of \$0 - \$499

☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/15      \_\_\_\_\_/\_\_\_\_\_/15

ACQUIRED      DISPOSED

► NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

☐ \$2,000 - \$10,000      ☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000      ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock      ☐ Other \_\_\_\_\_ (Describe)

☐ Partnership      ☐ Income Received of \$0 - \$499

☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_\_/\_\_\_\_\_/15      \_\_\_\_/\_\_\_\_/15

ACQUIRED      DISPOSED

► NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

☐ \$2,000 - \$10,000                      ☐ \$10,001 - \$100,000

☐ \$100,001 - \$1,000,000              ☐ Over \$1,000,000

NATURE OF INVESTMENT

☐ Stock              ☐ Other \_\_\_\_\_  
(Describe)

☐ Partnership    ☐ Income Received of \$0 - \$499  
                                 ☐ Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/15              \_\_\_\_/\_\_\_\_/15

ACQUIRED                      DISPOSED

**FPPC Form 700 (2015/2016) Sch. A-1**  
**FPPC Advice Email: [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)**  
**FPPC Toll-Free Helpline: 866/275-3772 [www.fppc.ca.gov](http://www.fppc.ca.gov)**

CAPISTRANO UNIFIED SCHOOL DISTRICT  
San Juan Capistrano, California

May 23, 2017

**INTERVIEW OF CANDIDATE(S) FOR VACANCY WITHIN TRUSTEE AREA 7**

---

Candidate Application for Shawn Gordon.

**AREA 7 TRUSTEE CANDIDATE APPLICATION  
LETTER OF INTEREST TO THE BOARD OF TRUSTEES**

Capistrano Unified School District

Please complete and return by **12:00 p.m. Wednesday, May 17, 2017** to Nicole Perez,  
Executive Secretary, Board Operations (nmperez@capousd.org), or leave at the Superintendent's  
office located at 33122 Valle Road, in San Juan Capistrano.

Date: 5-13-17

Gordon, Shawn, M  
(Last Name) (First Name), (Initial)

Business Address: 5 COLUSO, RSM, CA 92688 Phone: 949-288-3771

Home Address: 5 COLUSO, RSM, CA 92688 Phone: ~~949-584-9257~~ ↗

E-mail: SMGA3000@GMAIL.COM

Occupation and Employer: computer consultant, software designer, The Company.com

No. of Years Residing in the District: 19

Do you have children in CUSD schools? Yes X No     

If yes, what schools? Tesoro High, ARROYO VISTA

In no more than five pages, please consider including information on any prior experience serving on a governing board, specifically a school district board, any school committees or participation in any school activities as well as role in any community or business activities. Also, please describe why you desire to serve as a school board member, what you view as the basic purpose of public schools, how your work as a Board member would fulfill this purpose and how the role of a Board member is different than the role of the Superintendent. Describe how you define the relationship between Board members and the District's administration in the handling of school concerns, your commitment to public education, what you view as the area(s) needing the most improvement in CUSD and what you believe are the strengths of the Capistrano Unified School District.

Shawn Gordon  
949-288-3771  
May 13, 2017

I have lived in CUSD District 7 since 1998, with 5 children working their way through the system since 2000 and I have 7 years left. 1 of my kids has graduated, 2 are at Tesoro and 2 are at Arroyo Vista. I spent years as the Committee Chair of cub scout pack 600 working with kids in that program as well as the Boy Scout program after that. I am currently on the parents oversight board for finance and facilities at CUSD that was recently formed after the failure of Measure M.

My expertise is in finding cost effective and efficient methods to solving problems. I design software systems and solutions for a variety of clients and industries, however I have no ties to the education system or industry in any way, so no conflicts of interest. My interest in being on the board is to help with the perpetual financial issues that seem to plague our district. With my vast experience with finding out of the box solutions, I think I can bring a unique perspective to the board and help push through the pressing issues that are facing us. Our district is filled with amazing students, parents and teachers that are all interested in what is best for the students to launch into successful adulthood and I believe I can help with that process.

While I'm applying for this position, I do strongly believe that the residents of District 7 should be able to vote on their representation. I'm not interested in this position for anything other than as a stopgap until the people are allowed to vote. I know I can provide excellent service to our community in the interim, but I'm happy to step aside for the election results once that happens.

If you have further questions about my background, you can review my LinkedIn profile at <https://www.linkedin.com/in/shawn-gordon-37b9916/>

# Shawn M. Gordon

Rancho Santa Margarita, CA 92688 | 949.288.3771 | [smga3000@gmail.com](mailto:smga3000@gmail.com)

## Professional Skills

- |                              |                                     |                            |
|------------------------------|-------------------------------------|----------------------------|
| * Data Quality & Integration | * Software/Web Design               | * Enterprise Cloud Systems |
| * Linux/Mac/Windows/Embedded | * Big Data System Integration       | * DevOps                   |
| * Security                   | * Relational DBMS Design            | * Compliance               |
| * Desktop Software Expert    | * Excellent Verbal & Written Skills | * SaaS                     |

## Professional Experience

*The Kompany*                      *IT/Cloud/Big Data Optimization Consultant*                      *Jan 1998/Present*

Grew global consumer product SME from \$6 Million annual sales to \$10 Million; \$7 million being from the eCommerce initiative that I designed and deployed, saving \$250,00 over a two-year span.

- Redesigned the ERP to web stock count synchronization process, dropping it from a four-hour run, to two minutes. Designed and wrote interface systems to connect backend MS Navision system to Amazon/eBay, resulting in over \$1.2 Million additional annual sales.
- Completely automated computer operations, avoiding the expense of hiring a full time IT staff. Deployed site wide enhanced network and user security.
- Analyzed all jobs done by resigned employees, successfully saved the company \$160K annually by personally automating their jobs, alleviating the need for any replacements.

Designed and deployed automated scanning/ocr/input system for \$70 million medical billing company; 20 direct reports

- Replaced 100 data entry employees with automated systems.
- Created algorithms for better PPO matching, resulting in additional \$386,000 revenue per year.

Established OEM partnerships with IBM, Sharp, Intel, Motorola, SuSE, Mandrake and TrollTech (Nokia)

- Managed RFI/RFP procurement processes, generated proof of concepts, and oversaw remote group of 23 developers to build 47 multi-platform software products, generating over \$500,000 in savings.

Open source systems integration for Rochelle, Tracking Point, Voxa, Hancom

- Built VoIP systems in 2004 for various partners
- Timeshifted streaming audio systems and VoIP console in 2005
- Smartphone to smart rifle scope integration in 2012

Business Intelligence (BI) and Big Data, building proof of concept systems to map navigation and genealogical data over time and geography. Wrote numerous case studies, technical documentation and papers.

*PayUSA*                                      *Director Information Systems*                                      *July 1996/Jan 1998*

Automated computer operations for a \$4 million dollar payment company, eliminating three employees, saving \$150,000 per year.

- Re-architected end of year tax processing, dropping run time from five days to four hours.
- Designed and deployed automated systems for Federal Tax EDI integration to avoid hiring two extra people at \$40k per year each out of a company of 40 employees.
- Designed and deployed real time, fully automated, bi-coastal disaster recovery system eliminating IT headcount.

## Education

*Computer Learning Center: Computer Programmer Cert (3.5 GPA)*



## STATEMENT OF ECONOMIC INTERESTS

Date Initial Filing Received  
Official Use Only

## COVER PAGE

Please type or print in ink.

NAME OF FILER (LAST)	(FIRST)	(MIDDLE)
Gordon	Shawn	Miles

## 1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Capistrano Unified School District

Division, Board, Department, District, if applicable

Board of Trustees

Your Position

Trustee

► If filing for multiple positions, list below on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_

Position: \_\_\_\_\_

## 2. Jurisdiction of Office (Check at least one box)

☐ State☐ Judge or Court Commissioner (Statewide Jurisdiction)☐ Multi-County \_\_\_\_\_☒ County of Orange☐ City of \_\_\_\_\_☐ Other \_\_\_\_\_

## 3. Type of Statement (Check at least one box)

☒ **Annual:** The period covered is January 1, 2016, through December 31, 2016.

-or-

The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_, through December 31, 2016.

☐ **Assuming Office:** Date assumed \_\_\_\_/\_\_\_\_/\_\_\_\_☐ **Leaving Office:** Date Left \_\_\_\_/\_\_\_\_/\_\_\_\_  
(Check one)☐ The period covered is January 1, 2016, through the date of leaving office.

-or-

☐ The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_, through the date of leaving office.☐ **Candidate:** Election year \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_4. Schedule Summary (must complete) ► Total number of pages including this cover page: 2

## Schedules attached

☐ **Schedule A-1 - Investments** – schedule attached☐ **Schedule C - Income, Loans, & Business Positions** – schedule attached☒ **Schedule A-2 - Investments** – schedule attached☐ **Schedule D - Income – Gifts** – schedule attached☐ **Schedule B - Real Property** – schedule attached☐ **Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or-

☐ **None - No reportable interests on any schedule**

## 5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)

PO Box 80265

Rancho Santa Margarita

CA

92688

DAYTIME TELEPHONE NUMBER

( 949 ) 288-3771

E-MAIL ADDRESS

smga3000@gmail.com

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

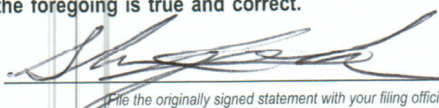
I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed

05/13/2017

(month, day, year)

Signature



(File the originally signed statement with your filing official.)



**SCHEDULE A-2**  
**Investments, Income, and Assets**  
**of Business Entities/Trusts**  
(Ownership Interest is 10% or Greater)

<b>CALIFORNIA FORM 700</b> FAIR POLITICAL PRACTICES COMMISSION
Name _____

**1. BUSINESS ENTITY OR TRUST**

Shawn Gordon dba The Kompany

Name

PO Box 80265

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2

☒ Business Entity, complete the box, then go to 2

**GENERAL DESCRIPTION OF THIS BUSINESS**

Computer Consulting

**FAIR MARKET VALUE**

- ☐ \$0 - \$1,999  
☐ \$2,000 - \$10,000  
☒ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

**IF APPLICABLE, LIST DATE:**

\_\_\_\_/\_\_\_\_/16      \_\_\_\_/\_\_\_\_/16  
ACQUIRED      DISPOSED

**NATURE OF INVESTMENT**

☐ Partnership ☒ Sole Proprietorship ☐ Other

YOUR BUSINESS POSITION Owner

**2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

- ☐ \$0 - \$499 ☒ \$10,001 - \$100,000  
☐ \$500 - \$1,000 ☐ OVER \$100,000  
☐ \$1,001 - \$10,000

**3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

☐ None or ☐ Names listed below

Sisense

**4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:

☐ INVESTMENT ☒ REAL PROPERTY

805-513-18.00

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Computer Consulting

Description of Business Activity or  
City or Other Precise Location of Real Property

**FAIR MARKET VALUE**

- ☒ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

**IF APPLICABLE, LIST DATE:**

\_\_\_\_/\_\_\_\_/16      \_\_\_\_/\_\_\_\_/16  
ACQUIRED      DISPOSED

**NATURE OF INTEREST**

☒ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold \_\_\_\_\_ ☐ Other \_\_\_\_\_  
Yrs. remaining

☐ Check box if additional schedules reporting investments or real property are attached

Comments:

**1. BUSINESS ENTITY OR TRUST**

SAAV Games

Name

PO Box 80265

Address (Business Address Acceptable)

Check one

☐ Trust, go to 2

☒ Business Entity, complete the box, then go to 2

**GENERAL DESCRIPTION OF THIS BUSINESS**

Computer Game Development

**FAIR MARKET VALUE**

- ☒ \$0 - \$1,999  
☐ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

**IF APPLICABLE, LIST DATE:**

\_\_\_\_/\_\_\_\_/16      \_\_\_\_/\_\_\_\_/16  
ACQUIRED      DISPOSED

**NATURE OF INVESTMENT**

☐ Partnership ☒ Sole Proprietorship ☐ Other

YOUR BUSINESS POSITION Owner

**2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

- ☒ \$0 - \$499 ☐ \$10,001 - \$100,000  
☐ \$500 - \$1,000 ☐ OVER \$100,000  
☐ \$1,001 - \$10,000

**3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

☐ None or ☐ Names listed below

**4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:

☐ INVESTMENT ☐ REAL PROPERTY

Name of Business Entity, if Investment, or  
Assessor's Parcel Number or Street Address of Real Property

Description of Business Activity or  
City or Other Precise Location of Real Property

**FAIR MARKET VALUE**

- ☐ \$2,000 - \$10,000  
☐ \$10,001 - \$100,000  
☐ \$100,001 - \$1,000,000  
☐ Over \$1,000,000

**IF APPLICABLE, LIST DATE:**

\_\_\_\_/\_\_\_\_/16      \_\_\_\_/\_\_\_\_/16  
ACQUIRED      DISPOSED

**NATURE OF INTEREST**

☐ Property Ownership/Deed of Trust ☐ Stock ☐ Partnership

☐ Leasehold \_\_\_\_\_ ☐ Other \_\_\_\_\_  
Yrs. remaining

☐ Check box if additional schedules reporting investments or real property are attached