



OSBA met strategic goals and protected its reserve fund

OSBA strengthened its position as Oregon's leading advocate for school boards during 2010-11, while maintaining financial stability.

Throughout the year, we pursued strategic goals in four areas: legislative advocacy, board leadership, affordable and effective services, and association strength. As this report shows, we achieved success in each area.



Fiscal year 2010-2011

LEGISLATIVE ADVOCACY

Our legislative team led a coalition that achieved passage of two mandate-relief bills by the 2011 Legislature. Senate Bills 560 and 800 reduced paperwork burdens for school districts and eliminated 28 obsolete or redundant laws affecting school districts and the Oregon Department of Education. This marks the first time mandate relief bills have passed the Legislature in recent memory.

Also in concert with coalition members, our team achieved a \$5.7 billion state budget appropriation in April for K-12 education. Through our collaborative effort and partnership with our members, we achieved this improvement over the Governor's initial proposal of \$5.56 billion.

Our legislative advocacy included an increased emphasis on equity for Oregon's students. For example, we urged the Legislature to include funding in any mandate regarding full-day kindergarten.

We also encouraged legislators to consider the funding and service impacts on small school districts if large districts were allowed to opt out of their education service districts.

We continued our practice of offering more legislative updates to our members than any other education advocate. We initiated webinars on legislative issues, holding two during the session. We also continued our daily updates, weekly e-newsletter and social media. And we responded to numerous phone calls and requests for presentations.

BOARD LEADERSHIP

As always, we provided extensive service to our members in the area of board leadership. This included our annual convention and conferences on board operations, labor issues and capital campaigns. In addition, we did the following:

- Conducted four Leadership Oregon seminars, graduating 18 participants.
- Held eight budget committee workshops.
- Presented onsite workshops for 46 school boards, covering issues such as roles and responsibilities, superintendent evaluation, public meetings, operating agreements and charter schools.
- Served 392 unique visitors in our online learning center, including 25 who registered for fee-based courses and 47 who used the free orientation for new board members.
- Increased assistance with governance questions by handling 10-20 inquiries per week and expanding the "Ask Betsy" website feature to more than 115 articles during the year.

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AFFORDABLE AND EFFECTIVE SERVICES

We maintained our central position as a service provider in the management, labor and legal areas.

On the management side, we began expanding our executive search services. This included adding a labor and employment consultant to our staff, along with paraprofessional services to help districts complete essential projects at lower cost. In addition, we added a database of candidates for positions other than superintendent, to help districts find the most qualified candidates in licensed, non-licensed and administrative office positions. We led superintendent searches for eight districts, negotiated superintendent contracts for eight, and helped nine districts revise their superintendent contracts.

We also maintained a fast pace on the labor side. This included the introduction of webinars on labor issues, with four conducted during the year. We led labor negotiations for 30 districts, and handled more than 650 inquiries on labor and contract issues.

On the legal side, we provided general counsel services to five school districts, a community college and one charter school. We held seminars for 28 districts, and fielded more than 600 phone calls. In addition, we helped eight districts with charter applications and regulation.

ASSOCIATION STRENGTH

We continue to build a financially viable organization that balances the needs of our membership with the association's fiscal health.

For example, during 2010-11 we secured partnerships. These included a strategic partnership, event-specific sponsorships and an Honors Partner, to sponsor a specific service for 2011-12.

During the year, we increased revenue from contract services by 10 percent, and from sales of publications by 28 percent.

Revenue from dues was essentially unchanged from 2009-10, in line with our commitment to maintain affordability for members.

To increase operational efficiency and improve member services, we chose and implemented new association management software. We also reviewed our contract billing procedures and developed changes based on the new software.

Our focus on efficiency enabled us to continue operating debt-free.

We also took steps to strengthen our commitment to equity. We joined the Association of Latino Administrators and Superintendents and the National Association of Black School Educators, and are now posting all of our superintendent openings with these organizations.

Financial Standing

YEAR ENDING JUNE 30, 2011

The OSBA's net assets were \$79,656,683 at June 30, 2011. Of this amount, \$27,818,565 was unrestricted, \$50,000,000 was restricted and \$1,838,118 was invested in capital assets.

During 2010-11, revenues totaled \$5,031,292. Program revenues accounted for approximately 53 percent of total revenues, and general revenues made up the rest. Contract services provided 42 percent of program revenues, followed by membership dues at 26 percent. Interest of \$2,374,605 accounted for most general revenues.

Expenses for the year totaled \$4,904,818. Personnel costs made up about 76 percent of the association's total operating expense. Most of the remaining expense consisted of convention and conferences; office expense; travel and auto; and building and lot.

FINANCIAL SUMMARY – For the years ending June 30, 2010 and 2011

	BUDGET 2010-11	ACTUAL		Increase or (Decrease)
		June 30, 2011	June 30, 2010	
Dues	\$698,000	\$699,493	\$700,619	(\$1,126)
Interest	2,248,273	2,374,605	2,519,855	(145,250)
Insurance Trusts Management Fees	324,000	320,569	6,282,402	(5,961,833)
Net Convention/Conferences	43,928	0	78,037	241,947
Convention/Conferences*		319,984	0	
Publication Sales	212,425	227,207	178,144	49,063
Contract Services	955,600	1,117,746	1,011,387	106,359
Grant Income				0
Rental Income	110,000	135,408	133,713	1,695
Sale of Automobiles		20,820	16,511	4,309
Gain/Loss on Investments		-222,041	179,576	(401,617)
Miscellaneous	128,000	37,501	9,988	27,513
TOTAL REVENUE	\$4,720,226	\$5,031,292	\$11,110,232	(6,078,940)
Salaries/Benefits/Contract Services	\$3,870,826	\$3,743,769	\$3,558,267	\$185,502
Legislative	36,000	9,512	16,208	(6,696)
Travel/Professional Development	365,800	331,350	362,149	(30,799)
Publications	33,064	35,734	10,857	24,877
Convention/Conferences*		247,082	0	
Office Expense	283,620	258,866	239,275	19,591
Dues and Subscriptions	152,582	128,247	120,797	7,450
Building/Operation/Land Acquisition	122,000	102,990	114,843	(11,853)
Other	120,500	47,268	33,898	13,370
TOTAL EXPENDITURES	\$4,984,392	\$4,904,818	\$4,456,294	\$201,442

*Beginning 2010-11, Convention/Conferences reported as Revenue and Expenditures, not Net.



PO Box 1068
Salem, OR 97308
1201 Court St NE Ste 400
Salem, OR 97301
www.osba.org
www.osba.org/facebook

Production: Betsy Miller-Jones, Interim Executive Director
Sharon Addison, Bookkeeper
Bill Dixon, Copywriter
Jenny Fedler, Publications Specialist
Diane Efseaff, Assistant

Questions regarding this publication or OSBA may be directed to the OSBA office at 503-588-2800 or 800-578-OSBA.

Send e-mail to info@osba.org.



2012 OSBA Staff

Betsy Miller-Jones, Interim Executive Director
Ron Wilson, Special Projects Director

Board Development & Policy Services

Joe Wehri, Associate Executive Director
Peggy Holstedt, Associate Director
Steve Lamb, Specialist
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Communications

Lonn Hoklin, Communications & Marketing Specialist
Diane Efseaff, Assistant
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Legal, Labor & Employment Services

Lisa Freiley, Associate Executive Director
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Operational Support Services

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