



## Sustaining the momentum

*The 2013 fiscal year saw OSBA – and ultimately its members – enjoy both significant program successes and continued strength in our financial foundation. The latter is due in part to the stock market’s sustained run, but is also attributable to the association modernizing its mix of investments.*

*OSBA continued its upward trajectory in programming by offering members a variety of learning and networking opportunities at the inaugural PACE Day, Annual Convention, Fall Regionals and Summer Board Conference. The association was pivotal in lobbying for changes to the Public Employees Retirement System (PERS) and in creating the “Strong Schools, Strong State” campaign, which led to significant increases to the State School Fund.*



### Fiscal year 2012-2013

#### MEETING MEMBERS’ NEEDS

When OSBA polled its members about their priorities, two rose to the top for 2012-13: turning around a decade of state disinvestment in public schools, and curbing PERS costs that were draining resources from the classroom. Accordingly, OSBA made those two issues top legislative priorities and organized allies to create momentum for change.

On the funding issue, OSBA initiated the “Strong Schools, Strong State” campaign and engaged partner organizations and members in lobbying for higher education funding. The result: The Legislature ultimately set the State School Fund at roughly \$1 billion higher than the governor’s proposed budget.

The struggle to make significant changes to PERS extended past the budget year and into the fall of 2013, when during a special session bills were passed that promise to reduce schools’ PERS liabilities by hundreds of millions of dollars. Again, OSBA stood at the heart of a coalition working on behalf of schools, and helped found a website at [fixpersnow.org](http://fixpersnow.org).

The PERS bills are being challenged in the state Supreme Court, and OSBA is paying to defend the legal challenge on behalf of school districts.

Once again, we are working to ensure that members’ voices are heard and that precious resources are directed where they belong: in the classroom.

#### SERVING MEMBERS IN A VARIETY OF WAYS

Our dedicated staff boasts a combined hundreds of years of experience in education services. They embrace our role of serving members and ensuring that Oregon schools are constantly improving.

Here are just a few of the departmental highlights from 2012-13:

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## 2013 Board of Directors

### Officers

#### President

Terry Lenchitsky  
Oregon Trail 46

#### President-elect

Lori Theross  
Klamath Falls City Schools

#### Vice President

Dave Krumbain  
Pendleton 16

#### Secretary/Treasurer

Bobbie Regan  
Portland 1J

#### Past President

Kris Howatt  
Gresham-Barlow 10

### Directors

David Beeson  
Silver Fall 4J

Linda Brown  
Lake Oswego 7J

Karen Cunningham  
Beaverton 48J

Sherry Duerst-Higgins  
South Lane 45J/Lane ESD

Greg Jackle  
John Day 3

Greg Kintz  
Vernonia 47J

Samuel Lee  
Winston-Dillard 116

Fred Marble  
Forest Grove

Doug Montgomery  
Multnomah ESD

Tass Morrison  
North Santiam 29

Doug Nelson  
High Desert ESD

Craig Prewitt  
Phoenix-Talent 4

Stan Primozich  
McMinnville 40

Anne Schuster  
Corvallis 509J

### Ex Officio Directors

Jim Harper  
Portland CC

Craig Hawkins  
COSEA Executive Director

Artemio Paz, Jr.  
Board Chair, Oregon State Board  
of Education

Verneda Wagner  
InterMountain ESD

## BOARD DEVELOPMENT/ EXECUTIVE SEARCH

- Increased OSBA annual convention attendance and established new regional roundtable discussion groups for convention.
- Conducted a variety of workshops for districts on issues ranging from ethics to public meetings to board governance.
- Continued our training work supporting improved student achievement with the Oregon Lighthouse Project, begun in 2009.

## COMMUNICATION SERVICES

- Re-established this as a functioning, productive team.
- Created a statewide public advocacy and communications campaign, “Strong Schools, Strong State,” that began by convening statewide stakeholder groups and ultimately involved nine partner organizations. Fifty-five districts passed resolutions in support of the campaign.
- Planned and executed all materials associated with Annual Convention.
- Finalized and implemented PACE marketing plan, and concluded first full year of PACE communication services.
- As part of the “Strong Schools, Strong State” campaign and PERS efforts, facilitated a number of meetings between Executive Director Betsy Miller-Jones and editorial boards around the state.
- Provided a wealth of publications, email updates and news items to ensure that members remained informed on training opportunities and the latest happenings.
- Authored several op-ed pieces in support of the PERS strategy, and worked directly with coalition partners on a variety of communications strategies.

- Continued providing the popular e-NewsClips with daily reminders about OSBA services and more national sources, and now tap into about 80 news sources daily.

## EXECUTIVE OPERATIONS & PUBLIC AFFAIRS

- Effective April 1, hired Michael Robison as director of finance to ensure that we could maintain stricter controls over our investments and finances.
- As noted above, changed our investment strategies to create better returns in the marketplace while remaining fiscally responsible.

## LEGAL AND LABOR SERVICES

- Negotiated dozens of labor union agreements.
- Provided superintendent contract evaluations, reviewed sample policies, and assisted with contract administration issues, including arbitrations and hearings.
- Held statewide Labor & Employment regional meetings in February at several locations, assisting members with such issues as PERS reform and health-care updates.
- Organized and presented the inaugural PACE\* Day in Portland, which was attended by about 140 people, and helped establish a new PACE website at [paceosba.org](http://paceosba.org).

*\* More Property and Casualty Coverage for Education (PACE) accomplishments are reported separately; see annual report.*

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## LEGISLATIVE SERVICES

- Had an extremely busy schedule, lobbying effectively, as noted above, to dramatically increase school funding.
- Was pivotal in lobbying for changes to the PERS system and worked closely with coalition partners.
- Conducted roughly 20 regional meetings to update members on new legislation.
- Worked with members to draft the 2013 Legislative Policies and Priorities.
- Continued efforts to increase OSBA's presence on and influence over the work of the Oregon Education Investment Board (OEIB), including drafting a bill requiring that a school board member serve on that board. The bill received wide legislative support but failed passage after the governor threatened a veto.



## POLICY SERVICES

- Continued our Policy Plus program to assist members in keeping their policy manuals current. For a monthly fee and four-year agreement, Policy department staff members update the member's policies with the recommended Policy Update language and prepare their policies for board reading and adoption.
- Responded to substantial requests for help from public charter schools. We provide a sample policy to help members receive grants so they can join as OSBA associate members and receive policy services.
- Updated Staff and Student Handbooks (done annually) to help districts keep up with legal changes to meet state and national requirements.
- Detailed expertise in areas such as special education, No Child Left Behind and Title I allowed staff to serve on many committees and as workshop/conference presenters. They worked closely with legal, legislative, human resources and other OSBA staff to keep information and advice accurate.

*OSBA continues to meet and exceed members' needs. It is an honor to share this information and serve as president.*

**Terry Lenchitsky**  
2013 OSBA President

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## 2013 OSBA Staff

### Executive

Betsy Miller-Jones  
Executive Director  
Jim Green  
Deputy Executive Director

### Board Development and Executive Search

Peggy Holstedt  
Director of Board Development and Policy Services  
Donna Herren  
Events & Executive Search Specialist  
Steve Lamb  
Board Development Specialist  
Renee Sessler  
Board Development Specialist  
Stacy Davis  
Executive Search Assistant  
Tonya Hammer  
Board Development Assistant

### Business Development

Jim Green  
Deputy Executive Director  
Lori Sattenspiel  
Legislative Services Specialist  
Becky Gwynn  
Operational Support Services/  
Legislative Assistant

### Communication Services

Tricia Yates  
Director of Communications  
Alex Pulaski  
Communications Specialist  
Josie Hummert  
Marketing Specialist  
Dan Peterson  
Reprographics Manager  
Diane Efseaff  
Communications Assistant

### Financial Services

Michael Robison  
Director of Finance  
Sharon Addison  
Bookkeeper

### Legislative Services

Jim Green  
Deputy Executive Director  
Morgan Allen  
Legislative Services Specialist  
Lori Sattenspiel  
Legislative Services Specialist  
Becky Gwynn  
Operational Support Services/  
Legislative Assistant

## 2013 OSBA Staff (continued)

### Legal, Labor and PACE Services

Lisa Freiley  
Director of Legal, Labor & PACE  
Services/Staff Counsel

Jenny Fedler  
Operational Support Services  
Manager/HR Coordinator

Ben Becker  
Attorney

Shawn Goodpaster  
Consultant

Jackie Marks  
Attorney

Haley Percell  
Attorney

Morgan Smith  
Attorney

John Stellwagen  
Attorney

Peggy Stock  
Consultant

Vicky Black  
Assistant

Maricela Highsmith  
Assistant

Ashley Town  
Assistant

### Operational Support Services

Jenny Fedler  
Operational Support Services  
Manager/HR Coordinator

Kathy Knock  
Management Information  
Specialist

Eric Mousel  
Webmaster

Vicky Black  
Legal, Labor & PACE Services  
Assistant

Stacy Davis  
Executive Search Assistant

Becky Gwynn  
Operational Support Services/  
Legislative Assistant

### Policy Services

Peggy Holstedt  
Director of Board Development  
and Policy Services

Rick Stucky  
Policy Services Specialist

Leslie Fisher  
Senior Policy Services  
Administrative Assistant

La'Nell Trissel  
Policy Services Assistant

## Financial Standing

OSBA's net assets were \$79,329,144 on June 30, 2013. Of this amount, \$29,329,144 was unrestricted, \$50,000,000 was restricted and \$269,862 was invested in capital assets.

During 2012-13, revenues totaled \$6,042,469. Program revenues accounted for 35.1 percent of total revenue, and general revenues made up the rest. Contract services provided 54.2 percent of program revenues, followed by membership dues at 33.2 percent. Interest of \$3,023,648 (or realized and unrealized gains) accounted for most general revenues.

Expenses for the year totaled \$5,546,186. Personnel costs made up 67.9 percent of OSBA's total operating expense. Most of the remaining expense consisted of convention and conferences, office expense, travel and building.



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