



The comeback year

The 2012 fiscal year could have been among the worst in the association's 67-year history. For many reasons I'm proud to share, however, it turned out to be one of the most triumphant.

REGAINING TRUST AND ESTABLISHING RELEVANCE

After making changes at the top, OSBA began turning the association around – organizationally and financially. Interim leader Betsy Miller-Jones and her team began the extraordinary task of reaching out to learn your priorities. With her financial planning background, she helped update our investment policy so we could invest more aggressively to meet the association's income needs. She also restructured operations to refocus on member services. By adding Deputy Executive Director



Fiscal year 2011-2012

Jim Green and asking Tricia Yates to lead communications, she renewed connections with key partners such as the Confederation of Oregon School Administrators and ramped up communications with our own members. As you already know, we asked Betsy to serve as permanent executive director, after a national search.

We ended the fiscal year with a strong legislative agenda. We've hit the op-ed pages of Oregon's major dailies with messages urging other leaders to place schools at the center of Oregon's long-term prosperity.

I'm especially proud that we're spearheading the "*Strong Schools, Strong State*" initiative with others on board:

COSA, OASBO, OEA, OSEA, PTA and OAESD. We're back to what matters: supporting kids in classrooms. OSBA isn't just joining coalitions to represent our champions – it's back to forming them! I can't emphasize the importance enough, now that this "critical mass" has successfully advocated for significantly more than the \$6.15 billion that was in the governor's original education budget proposal.

PLAYING TO OUR STRENGTHS: DECADES OF EXPERIENCE

While we re-tooled the association, a strong engine hummed in the background ... also not missing a beat. OSBA staff actually improved services throughout weeks of leadership turmoil and uncertainty – a credit to our committed staff, and their literally hundreds of combined years of experience in education services.

Look at it this way: They kept us spinning while OSBA was rotating on its axis. A look at a few departmental highlights tells this story.

LEGAL AND LABOR SERVICES

- This was an unusual year, with three districts facing teacher strikes: Gresham-Barlow, Reynolds and Eagle Point. We have not had two teacher strikes in the same year since 1990. OSBA provided Strike Intervention Management services for two: Gresham-Barlow and Eagle Point. Prior to this year, the last teacher strike in Oregon was in Multnomah ESD in 2007. Since 1973, when collective bargaining legislation was enacted, there have been 24 teacher strikes.
- Four staff negotiated 79 labor union agreements, with 33 still open at the end of the fiscal year.
- Legal staff provided superintendent contract evaluations, reviewed sample

2013 Board of Directors

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policies, and assisted with 21 contract administration issues, including arbitrations and hearings.

- The statewide Labor & Employment Conference was converted to a one-day gathering, saving districts time and money – and held in six locations, reaching even more districts than in past years.
- Regional meetings in February helped members navigate health-care reform and its affect on union contracts.

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

LEGISLATIVE SERVICES

- This department had a busy schedule, keeping up with annual legislative sessions beginning last fiscal year and publishing a detailed weekly recap of laws affecting public schools.
- Advocates focused on ensuring that K-12 schools didn't suffer reductions in funding, as experienced by other priorities in the General Fund Budget – and helped ensure an increase in the general fund budget by \$2.5 million to continue the Small High School Grant program.
- Conducted 17 regional meetings to update members on new legislation.
- Worked with members to draft the 2013 Legislative Policies and Priorities, with a focus of being more proactive in future sessions.
- Increased OSBA's presence and influence over the work of the Oregon Education Investment Board (OEIB) and new achievement compacts required by districts, including an "accountability model" for school boards to share with communities.

BOARD DEVELOPMENT/ EXECUTIVE SEARCH

- Increased OSBA annual convention attendance (last fiscal year's convention was in 2011) by 30 percent, showing the relevancy of the 73 breakout sessions offered, including moving Hot Topics to Sunday. Evaluations often noted "best ever" convention. A revamped

convention schedule was based on member feedback, including moving the annual meeting to this valuable time.

- Conducted Roles & Responsibilities workshops for 36 districts; helped nine districts with Budget Committee workshops and Goal Setting for six districts. Targeted workshops were provided on Ethics, Public Meetings, Facilitation, and Board Governance.
- Continued our training work supporting improved student achievement with the Oregon Lighthouse Project, began in 2009. David Stevens, chair of the South Umpqua School Board, says Lighthouse training has been "an incredibly valuable tool" in helping his board members solve problems together.
- The Online Learning Center added three courses: Educational Equity: Racial Equity, Board Governance through Policy, and Strategic Planning, plus updated the New Board Orientation and school law courses. Five more courses were in the works as the year ended.
- Aligned OSBA's superintendent evaluation materials with new TSPC requirements.
- Conducted executive searches for Amity, Banks, Central, Mapleton, Newberg, Reedsport, Scappoose and Sutherlin districts and laid the groundwork for expanded web postings and a new candidate recruiting process, plus a video interview option. We also expanded recruiting services to post director-level positions on our website.

POLICY SERVICES

- This department was restructured to align services with the policy needs of districts facing downsizing; we moved board development work to the newly assigned Board Development department so this small but highly experienced crew could focus on helping districts update policies.
- As district resources decrease with central office downsizing, more districts turned to us to host their policies online.
- Launched a 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 significantly increased 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.
 - Staff and Student Handbooks are updated annually to help districts keep up with legal changes to meet state and national requirements – and the invaluable Key Dates and Activities Calendar subscription was put online.
 - Our policy staff's detailed expertise in areas such as special education, No Child Left Behind and Title I allows them to serve on many committees and as workshop/conference presenters. They work closely with legal, legislative, human resources and other OSBA staff to keep information and advice accurate.

EXECUTIVE OPERATIONS & PUBLIC AFFAIRS

- Realignment was the key word behind organizational shifts to match our structure with member services – and to strengthen financial stability. We restructured departments after traveling throughout Oregon to conduct listening sessions to learn your priorities and needs.
- We conducted an outside review of OSBA's legal status, which controls investment options. We also developed a multi-year budgeting strategy that included new internal tracking software, with monthly reports for the OSBA Board.
- Our investment policies are conservative, but we've retained legal counsel to make sure we don't miss economic recovery opportunities in the market. We also took steps to ensure that the financial director position – a critical one – returned to being in-house.
- We upgraded our 14-year-old membership database; data is now

centrally compiled, integrates with the website to improve online services, and is accessible to all staff.

COMMUNICATION SERVICES

- Under new executive leadership, OSBA became more proactive in statewide media, working with key communications leaders – the governor's press secretary, Oregon Department of Education and the Oregon School Public Relations Association.
- Staff helped OSBA leaders reach major dailies with "re-investment" messages about public education's strong impact on the economy: Dave Krumbein (*Bend The Bulletin*); Lori Theros (*Medford Mail-Tribune*); Kris Howatt (*Statesman Journal*); myself (Terry Lenchitsky) in the Eugene *Register-Guard* and *Sandy Post*, and Betsy Miller-Jones in *The Oregonian*. Our role as leaders was amplified more loudly than ever before.
- Knowing members were concerned about sudden leadership changes, we began regular video updates on the website.
- We began the Districts Helping Districts web feature to share innovative ideas on school improvement, and a web page dedicated to Oregon Education Investment Board resources.
- We are working with the governor's office, COSA and other partners to help members implement the Achievement Compact requirement created by the Legislature in 2011.
- We expanded the popular e-NewsClips with daily reminders about OSBA services and more national sources – we now tap into 79 news sources a day.

OSBA is back on track to meet your needs. I'm honored to share last year's triumphs and to lead you through this year as president.

Terry Lenchitsky
OSBA President

2013 OSBA Staff

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Deputy Executive Director

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Events & Executive Search Specialist
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Sharon Addison
Bookkeeper

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YEAR ENDING JUNE 30, 2012

OSBA's net assets were \$78,832,861 at June 30, 2012. Of this amount, \$28,832,861 was unrestricted, \$50,000,000 was restricted and \$654,641 was invested in capital assets.

Financial Standing

During 2011-12, revenues totaled \$4,558,263. Program revenues accounted for 64.3 percent of total revenue, and general revenues made up the rest.

Contract services provided 42.9 percent of program revenues, followed by membership dues at 22.6 percent. Interest of \$1,627,139 accounted for most general revenues.

Expenses for the year totaled \$5,382,085. Personnel costs made up 70.6 percent of OSBA's total operating expense. Most of the remaining expense consisted of convention and conferences; office expense, travel and auto, and building and lot.



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BOARDS
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