



Keeping the “Promise”

This has been a year filled with promise – “The Promise of Oregon,” our new, comprehensive statewide effort to celebrate the successes of Oregon’s students and to ensure that we invest in public schools so that our young people can achieve their maximum potential. While that has been our signature work, including a significant investment of capital and staff resources on OSBA’s part, it represents just part of our efforts on behalf of members.

OSBA and its members enjoyed an important legislative success over Public Employees Retirement System (PERS) reform in fiscal year 2014, with long-ranging financial implications for schools statewide. Our members also shared in our firm financial foundation and the



Fiscal year 2013-2014

strength of our program offerings. OSBA provided members with a wealth of learning and networking opportunities at the Bonds, Ballots and Buildings Conference; the second PACE Day: Safe and Secure Schools; Annual Convention; Fall Regionals; and Summer Board Conference.

TAKING THE LEAD

OSBA led a coalition of groups in legislative efforts to make significant changes to PERS during the 2013 regular session. Finally, in the fall of 2013, bills were passed during a special session that made some of the reforms OSBA had said were needed. Collectively, Oregon schools stand to save hundreds of millions of dollars because of reduced PERS liabilities over the next several years.

OSBA’s work to support members on the PERS front didn’t end there, however. Labor unions filed suit challenging the bills in state Supreme Court, and OSBA is paying to defend the legal challenge on behalf of school districts.

Across the state, individual districts have moved forward with implementation of Common Core State Standards, and the tests associated with them. To assist districts facing questions from the public and within their districts, OSBA staff developed resources explaining the standards and implications for schools responding to requests to avoid their implementation.

Our members have made clear that replacing aging school buildings is a priority. Our staff and a leader of OSBA’s Board of Directors (2014 President-elect Dave Krumbein) worked closely with a state task force to help frame findings, and our legislative team forged plans for legislation in the 2015 session to use state bonding authority to help pay for school construction.

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2014 Board of Directors

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Lori Theros
Klamath Falls City Schools

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Pendleton 16

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Secretary-Treasurer

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Tass Morrison

North Santiam 29

Doug Nelson

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Phoenix-Talent 4

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Betty Reynolds

West Linn-Wilsonville 3J

Maureen Wolf

Tigard-Tualatin 23J

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Board Chair, Oregon State Board
of Education

Joel Robe

Oregon Department of Education

As those efforts were undertaken, OSBA simultaneously prepared for the launch of the “Promise” campaign. Communication Services and Operational Support Services staff worked closely with a contractor to lay the groundwork for a November 2014 debut, including developing website content, creating social media channels and visiting 30 school sites statewide to collect images and statements from students.

SERVING OUR MEMBERS

Our dedicated staff members have a combined hundreds of years of experience in education services. They embrace our role of serving members and ensuring that Oregon schools are always getting better.

Some departmental highlights from 2013-14:

BOARD DEVELOPMENT

- Continued the Oregon Department of Education grant-funded Lighthouse Project work with seven districts.
- Organized and implemented two major conferences: the Summer Board Conference (including board secretaries) with participants representing 61 districts; and the OSBA Annual Convention (including board secretaries) with participants representing 169 districts.
- Provided ongoing Board Development Services; staff presented 54 in-district workshops.
- Piloted a new service: Board Development Plus with two participating districts.
- Delivered PACE regional trainings: six regional PACE workshops statewide covering topics including Hiring Best Practices, Discipline/Discharge, Employment Practices

Liability, Social Media: New Tools, New Trials, and Sexual Conduct and Improper Staff/Student Relationships.

COMMUNICATION SERVICES

- Created and delivered a statewide public advocacy campaign, “The Promise of Oregon,” which included a new website, images of more than 150 students, multiple videos, public outreach, board member and other individual toolkits, social media channels, resolutions, petitions, news articles and more. Supported from the outset by the OSBA Board of Directors, it began by convening statewide stakeholder groups and selecting Blue Chalk Media as contractor.
- Planned and executed the comeback of the highly successful Bonds, Ballots and Buildings Conference in Salem.
- Planned and executed all materials associated with Annual Convention and Summer Board Conference.
- Created a wealth of marketing tools and other publications for PACE, and concluded second full year of PACE communication services.
- Created a variety of publications, email updates and news items to ensure that members remained informed on training opportunities and the latest happenings.
- 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.

LEGISLATIVE SERVICES

- Worked with members to draft the 2015 OSBA legislative priorities and policies. These were adopted as resolutions approved by the membership this past fall.

Continued

- Conducted 20 Fall Regional meetings across the state engaging nearly 700 individuals.
- Worked closely with the Communications Department on The Promise of Oregon campaign and transitioning the campaign into the advocacy portion for the 2015 legislative session.
- Continued efforts to increase OSBA's presence on and influence over the work of various state level agencies and departments, including the Oregon Education Investment Board (various issues including achievement compact modifications), the state Board of Education (instructional hours requirements), the state Land Board (utilization of the Elliott State Forest) and the PERS Board, to name a few.
- Worked with various coalition partners leading up to the 2015 legislative session to ensure the highest level of funding possible for public schools.
- Drafted numerous pieces of legislation to enact OSBA's legislative priorities during the 2015 legislative session.



LITIGATION SERVICES

- Continued to hone department services to members through a more focused delivery model. OSBA attorneys concentrated on either pre-loss or litigation. In providing pre-loss services directly to members, staff attorneys gave legal advice and guidance on a variety of topics to members around the state. Staff attorneys handled more than 1,200 inquiries. Telephone and email inquiries continued to increase as more members took advantage of our services.
- Handled a wide variety of cases for members. Highlights included securing a favorable jury verdict in southern Oregon on a student injury case and successfully defending that verdict on appeal. OSBA attorneys negotiated a favorable settlement of a Title IX class-action lawsuit involving a coastal district. The attorneys also favorably settled a potentially financially catastrophic head injury case prior to trial, and were able to obtain dismissals of numerous BOLI and EEOC complaints, avoiding lawsuits in those matters.
- Conducted a number of trainings around the state and presented at numerous conferences.
- Continued to work with the Policy and Communications departments on a number of issues, providing legal support and analysis.

OPERATIONAL SUPPORT AND FINANCIAL SERVICES

- Obtained a clean audit for fiscal year 2012-13.
- Fully implemented the OSBA investment policy and consolidated the investments into a single custodial bank (Comerica).

2014 OSBA Staff

Executive

Betsy Miller-Jones

Executive director

Jim Green

Deputy executive director

Jane Leonhardt

Executive assistant

Board Development and Executive Search

Peggy Holstedt

Director of board development and policy services

Donna Herren

Events and executive search specialist

Spencer Lewis

Board development and policy specialist

Renee Sessler

Board development specialist

Allison Markoski

Member services

Tonya Hammer

Board development/ event planning assistant

Business Development

Jim Green

Deputy executive director

Lori Sattenspiel

Legislative services specialist

Tonya Hammer

Board development/ event planning assistant

Communication Services

Tricia Yates

Director of communications

Alex Pulaski

Communications specialist

Rachel Fleenor

Marketing – communication and social media consultant

Dan Peterson

Reprographics manager

Diane Efseaff

Communications assistant

Continued

2014 OSBA Staff (Continued)

Labor and PACE Services

Lisa Freiley

Director of labor & PACE services/
staff counsel

Jenny Fedler

HR manager

Jason Bos

Labor & PACE services specialist

Peggy Stock

Labor & PACE services consultant

Lora Carter

Labor & PACE services assistant

Pamela Mullen

Labor & PACE services assistant

Legislative Services

Jim Green

Deputy executive director

Morgan Allen

Legislative services specialist

Lori Sattenspiel

Legislative services specialist

Jane Leonhardt

Executive assistant

Litigation Services

John Stellwagen

Senior litigation services attorney

Ben Becker

Litigation services attorney

Haley Percell

Litigation services attorney

Meg Rowe

Pre-loss attorney

Erica Vodden

Litigation services paralegal

Maricela Highsmith

Litigation services assistant

Operations and Finance

Michael Robison

Director of operations and finance

Sharon Addison

Accounting specialist

Kathy Knock

Management information
specialist

Eric Mousel

Webmaster

Vicky Black

Operational support
services assistant

Andrew Norval

Assistant IT specialist

- Developed the Bill Tracking and E-mail Our Legislator for the Legislative Services Department.
- Evaluated and selected a new virtual meeting software platform (Zoom).
- Increased the investment portfolio by \$1.8 million through realized gains from the sale of equities and bonds (\$800,000); also shifted \$1 million from the Local Government Investment Pool to bonds.
- Implemented a new project management style for new information technology (IT) projects for OSBA.

LABOR AND PACE SERVICES

- Assisted members in the negotiations of dozens of labor agreements.
- Provided Labor and Employment regional trainings in seven locations throughout the state, with a focus on preparation for bargaining, implementation of the new evaluation matrix, recent developments in labor and employment laws and how to have the difficult conversation when necessary.
- Advised members on various human resources and labor relations issues throughout the year.
- Provided support and training via our liaison relationship with the Oregon School Personnel Association.
- Supported increased participation at the second annual PACE Day: Safe and Secure Schools.
- PACE financially supported the implementation of the Standard Response Protocol to assist members in crisis management and rolled out a statewide tip line for PACE members.

POLICY SERVICES

- Maintained the online Student Achievement Gateway resource page on the OSBA website with useful, up-to-date information.
- Worked collaboratively and interdepartmentally to complete the Common Core Toolkit.
- Completed in-district training for the \$20,000 ODE grant-funded project Common Core, Smarter Balanced – A Systems Approach to Student Achievement. This is now offered by Board Development as a fee-for-service training.
- Managed 25 open projects, an increase from the previous year as a result of more available services. The public charter school policy projects continued to increase, and desk rewrites (including the new small district desk rewrites) and Policy Plus subscriptions kept our staff busy; OSBA now hosts 114 member board policy manuals online.
- Provided important information on changes to Interdistrict Transfers and open enrollment in recent issues of OSBA's Policy Update.
- Policy Services staff and OSBA's event specialist prepared for jointly hosting the June 2014 National School Boards Association AASPS/ Trainers Joint Conference in Portland.
- Peggy Holstedt, director, was named to the Governor's Task Force for School Safety as the OSBA representative required by statute.

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

Lori Theros
2014 OSBA President

Financial Standing

OSBA's net assets were \$84,919,612 on June 30, 2014. Of this amount, \$34,919,612 were unrestricted, \$50,000,000 were restricted and \$776,880 were invested in capital assets.

During 2013-14, revenues totaled \$11,364,446. Program revenues accounted for 28.8 percent of total revenue, and general revenues made up the rest. Contract services provided 40.4 percent of program revenues, followed by membership dues at 21.5 percent. Interest of \$8,085,895 (of realized and unrealized gains) accounted for most general revenues.

Expenses for the year totaled \$5,773,978. 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.

2014 OSBA Staff (Continued)

Policy Services

Peggy Holstedt

Director of board development
and policy services

Rick Stucky

Policy services specialist

Spencer Lewis

Board development
and policy specialist

Allison Markoski

Member services

Leslie Fisher

Senior policy services
administrative assistant

La'Nell Trissel

Policy services assistant



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