

2025 OSBA Annual Convention Executive Summary

Attended by: Erik Johnsen and Angela Zbikowski

Session Summaries:

Keynote: Leading Through Complexity, Matt Lehrman

- See supplemental handout summary.
- Very good presentation, and very timely for what the MSD board is working on.
- “Courage” is listening to someone you disagree with.
- The Board determines the “What,” and the Staff determines the “How,” but of course there is collaboration.



Post-Keynote: Leading Through Complexity Breakout (EJ)

- Facilitated discussion of attendee situations and experiences

Oregon Government Ethics Law Overview Breakout (AZ)

- **ACTION ITEM:** Review the plan for a true district emergency- will board members hear from Jeanne directly or does she delegate someone who disseminates info out because she's busy handling the emergency? Reminder to know our policy - only the chair publicly speaks on behalf of the board etc.
- Reminder about not responding to all in email - watch public meeting rules
- Everything goes back to policy. Invest the time to know policies by heart and that's your first stop in any questionable situation; what does existing policy say?
- Salem city council - violated serial meeting policy - fines could be up to \$1k per member and training - the public needs to hear the discussion and know why we arrive at what we do
- Law dictates no chair can serve more than 4 years in a row (newer law)
- Reminder: Quorum to HOLD meetings but MAJORITY required to conduct business

OSBA Regional Discussion Roundtables

- Discussion mostly centered around lobbying for fiscal matters.
- Dawn Watson is the incoming OSBA president
- Some discussion of overhauling OSBA bylaws, to give more equitable apportionment to voting weights across the region (for context: in the past, each board member got a vote, currently each board gets one consolidated vote without regard to district size).
- Discussion of upcoming “Meet the Legislators” event - likely happening in the first couple weeks of January - and where to hold it. Grants Pass offered to host.
- Dawn advocated for a consolidated voice - not individual complaints from each district but what can we all agree is an issue, quantify, and provide clear data around? Example - unfunded mandates. GP put forward the issue of cost of substitutes during paid leave.
- **ACTION ITEM:** We need to think about what issues we want to raise with legislators, what a clear and specific ask might be, and what data we have to support

- **ACTION ITEM:** Do we want to 'host' in one of our schools? Do we have any student groups that would want to perform? If so, we need to let Dawn know ASAP.

"Help! Our Superintendent is Leaving! Now What?" Breakout (EJ)

- Mostly a discussion of OSBA's Superintendent search service. May be cheaper, but seems to put more work and onus on the board and on staff.
- Policy CBA is our Superintendent Job Description.
- Bring in community feedback early in the process.

Unlocking the Power of the Superintendent-Board Partnership (AZ)

- Many board members are also parents in the district; We should tap into board member parent experiences to help all board members be more familiar with challenges and wins at different schools/grade levels/programs.
- PPS does FOUR retreats a year - sometimes training, sometimes brings in longterm past members to discuss or advise from times when things went well - what worked or what should we know. An idea to consider if we get to a point that we feel we need advice or get stuck.
- Advice on making a culture shift - 'assume positive intent' 😊 Problems for any of us are problems shared by ALL of us.
- Remember that being a superintendent is the loneliest job. The role of a board member is to hold the superintendent accountable yes, but that means ensuring super has the tools, resources and especially support to enable their best possible performance of the job. If the superintendent is successful then the district is. And if she's not then there's zero possibility that the district is, so part of the role is to ensure superintended feels well supported.
- Building trust: have to stop saying everything is fine. 'Things are shit' said Hattrick (Ashland) - got quoted in the paper and by OSBA - but helped build trust with the community because it was honest.
- Keeping board member perspective of being governance not advocates - it's a fine balance - works best when we all agree to the protocols and stick to them. Before you do any action (maybe meeting teachers, maybe superintendent search, maybe evaluating Jeanne etc.) - go back and look at the board goals and think about how the action aligns or doesn't.
- When we don't keep focused on the board goals, we get in a pattern of always addressing the 'emergency of the day' and never addressing the main thing that needs done. Analogy: Building maintenance should cost \$10k but if you keep putting it off to focus on the thing of the day eventually the job costs \$2m. What is the cost to our kids when we 'spend' our attention on the emergency of the day? Literally read board goals before every meeting and tie every action and discussion to how it accomplishes the goals if we're going to move the needle on big things.
- Knowing and leaning into team strengths - we don't all have to deep dive on every single thing - if we have trust and a solid understanding of who is strong in what areas we collectively can do more good. It's a marathon, a long game, we all have to take a turn

with the baton. One person can't carry the whole team forever. Analogy of a choir - they can hold a note forever with all their voices together.

- Default answer for absolutely everything is policy. Came up in multiple threads and Q&A - what does your policy say?? Not just for the existing board/staff/students but for those to come. Policy is everything.

Garrett Hemann Robertson reception

- Got to meet and have brief discussion with Rebekah Jacobson

Saturday General Session: Panel Discussion with legislators

April Dobson (D, Happy Valley), Emily McIntire (R, Eagle Point), Sue Rieke Smith (D, Clackamas), Boomer Wright (R, Reedsport)

- Rep. McIntire contrasted budgets of Oregon & Oklahoma
- Rep. McIntire: "If we don't hear from you, we're just going to do what we want." The message is to advocate.
- Lots of discussion on unfunded mandates, the accountability bill, budget shortfalls
- Policy topics coming up in 26: classroom size, funding for summer school; expecting big asks from unions; Hoping to pause or pull back unfunded mandates
- Submit testimony - OLIS can be written or virtual or in person:
https://www.oregonlegislature.gov/OLIS_help/Pages/Testimony.aspx

[Food Service exhibitor feedback (EJ)]

- If there isn't a realistic chance, don't waste our time.
- Allow providers to come talk to you.
- Allow a presentation for finalists, so the constituents can sample food.

The Fiscal Wake-Up Call breakout (EJ)

- Presentation from the Ashland School District about their recent fiscal crisis.
- Early warning indicators:
 - Fund balance trends as a percentage of expenses. Review at least quarterly, maybe monthly.
 - Maintain 8% in reserves, at a minimum
 - Enrollment projections vs reality
 - Multi-year budget forecasts (maybe)
 - Staffing ratios & costs (Ashland was 14:1)
 - Frequent budget adjustments
- Budgeting 101
 - Ongoing Needs Assessment: where are we investing money, and are we getting the benefit we expected?
 - A-ROI (Academic Return on Investment): Mixed usefulness; how do you measure?
 - How much cash will we have?
 - Continuous Program review
 - New Mandates
- Review of State School Fund formula

- Typical Reports (examples included in supplemental handouts)
 - Expenses by Object and Function
 - Over-allocations YTD
 - Encumbrances
- Board Leadership (during difficult times)
 - Modeled effective crisis leadership
 - Recognized role was not to micromanage, but ask right questions, and empower staff to provide solutions
 - Board attended community listening sessions. Absorbed difficult feedback. Provide emotional support (for the Supe)
 - Board expertise is in governance, not day-to-day management.
 - Trust Supe and Business manager to craft solutions, maintaining accountability through transparency
- Build trust and mutual respect between Board and Supe. Then you can have tough conversations.
- Key Take-aways:
 - Prevention beats crisis management
 - Define roles clearly. Board-Supe operating agreement.
 - Communicate transparently your finances (can lead to money)
 - Support your leaders

Hot Topic Rountables

- Evaluating Leadership for Student Success (EJ)
 - Reviewed OSBA resources for Superintendent evaluations
- D.C. Download (EJ)
 - Summary of current issues affecting the government shutdown
- The Power and Responsibilities of Free Speech (EJ)
 - Discussion of rights and limitations to free speech in the school setting. (see supplemental handout)
- Policy Hot Takes (AZ)
 - See handout for upcoming policy updates from Spencer/OSBA - should hear OSBA take on each of these late December or Early January
 - ACTION ITEM: NEW LAW HB2684 dictates that we must review pest control plans every 5 years - when last reviewed?
- Executive Sessions (AZ)
 - Most common public meeting law violation: We have to open as a regular meeting and then motion to move to executive
 - MUST hold each other accountable to *NARROW SCOPE* - you cannot veer into things that should be public. \$1k fine *per member* for violations of exec session regulations.
 - Exec session notes should be consistent with the depth or brevity of public sessions - the rule is that the two need to be equitable
 - See handout for other important bullet points
- Education Accountability Act (AZ)

- Questions about the new law can go to cassie.medina@ODE.oregon.gov
- December 11th, ODE will be reviewing and selecting approved interim assessment providers
- Unlike other standardized tests, the intent is that students should NOT be able to opt out of these assessments
- See handout for additional info

Collective Bargaining Agreement Negotiation Basics breakout session (EJ)

- Review of collective bargaining history, basic philosophies and approaches, rules, roles of board members

“Closing Schools, Not Communities” breakout (AZ)

- No one wants it, but focus on what a consolidated/larger school makes possible for students (ie no blended classrooms, full time/not shared resource personnel, etc)
- Base it on an objective overview of complete district resource utilization - NOT a single factor like current enrollment/boundary lines etc and bring the public in WELL before the final decision is made
- If the building is an owned asset - how can it remain part of the community even when not in use as a school (ie the gym)
- Biggest takeaway: How Corvallis has navigated a school closure while retaining public trust - look at their district website:
<https://www.csd509j.net/departments/facilities-and-maintenance/long-range-planning/school-consolidation/>
- Right on the main front page - hub for all documents, discussions, meetings, timeline etc related to consolidation. Captured every single question ever asked publicly - 330 questions asked and answered listed on the site AND emailed out weekly to a massive wide distribution list, fully transparent with the public.
- Critical piece was that staff and expert 3rd party evaluators were trusted to be experts and share expert information; board is trusted to make the decision. Everyone stayed in their lane and relied on others to do their part. Very very collaborative and supportive between staff and board and the public sees and feels that.