

Work Session

Thursday, March 19, 2026 6:00 PM

District Office , 150 SW Evergreen, Mill City, OR 97360

1. **Call to Order**

2. **Flag Salute**

3. **Approval of Agenda**

4. **Board Training - Janet Avila - Medina, OSBA
Trainer**

4.1. OSBA BGE Training 3-19-26

5. **Adjourn**

BOARD GOVERNANCE ESSENTIALS



Janet Avila-Medina
Board Development Specialist

Basic Board Principles



Public Meetings
Laws



Governance vs.
Management Roles



Pitfalls to avoid



Policies



Processes &
Procedures



Best Practices



Public Meetings Law

The Basics & Resources



PROPERTY AND CASUALTY COVERAGE FOR EDUCATION (PACE)

OSBA and the Special Districts Association of Oregon (SDAO) formed PACE in 2006. Governed by a nine-member appointed board of trustees, PACE is a self-insured risk insurance pool that offers unequaled price and coverage options for property and general liability coverages to its members.

Learn more: [**pace.osba.org**](https://pace.osba.org)

- Helps keep Oregon students safe, reduce risks and conserve member resources.
- Offers a variety of trainings and resources.



Impartially and effectively administers and enforces Oregon's Government Ethics Laws for the benefit of Oregon's citizens.

www.oregon.gov/OGEC

- [Oregon Procedural Rules: Compliance and Sanctions](#)
- Oregon Government Ethics Law – [ORS Chapter 244](#)
- Oregon Public Meetings Law – [ORS 192.610 to ORS 192.705](#)
- Lobby Law – [ORS 171.725 to ORS 171.785](#)
- [Oregon Administrative Rules \(OAR\) Chapter 199](#)

OGEC Authority

- Civil penalty of up to \$1,000 for each board member for violation of public meetings law (ORS 244.350(2)(a))
 - No civil penalty if acting at the advice of legal counsel, but letter of education is possible (ORS 244.350(2)(b))
- Lawsuits against the district
- Insurance policies generally do not provide insurance coverage to entities and individuals who intentionally violate the law

A graphic with a blue background and a photograph of people in a meeting. The text reads: "PUBLIC MEETING Do's and Don'ts". Below this, it says "REQUIRED TRAINING APPROVED BY THE OREGON GOVERNMENT ETHICS COMMISSION". The Oregon School Boards Association logo is in the top left and bottom left corners.

Login

OSBA Home My Resources 🛒 ⚙️ ?

Home

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Password

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[Log in](#)

Welcome to OSBA/PACE Membership Portal

This portal can be used to:

- Manage your contact information and school district information
- View memberships and subscriptions
- Register for OSBA and PACE events
- Set your email preferences

After you are logged into the portal, you can use the menu at the top of the screen to navigate through the system.

We have sent all members emails containing their default usernames and passwords. Please update/change your password once you log into the system by clicking on information under the contact tab.

If you have any questions please contact the OSBA Office at 800-578-6722.

en/ise

[Privacy Policy](#) | [Terms of Use](#)

15.3.2025.8

OAR 199-050-0005 – “Quorum” means...

“the minimum number of members of a governing body required to legally transact business.”

ORS 332.055. “A majority of the members of the district school board shall constitute a quorum... The affirmative vote of the majority of members of the board is required to transact any business.”

ESDs: ORS 334.100; **Community Colleges:** ORS 341.283

Charter Schools: may vary, see bylaws and charter agreement.

Public Meeting Law applies to the following types of meetings:

- Regular Meetings
- Special Meetings
- Emergency Meetings
- Executive Sessions, whether convened separately or as part of a regular, special, or emergency meeting; and
- Meetings held for the purpose of either presenting information to the governing body to prepare the governing body for a regular or special meeting, or to allow the governing body to engage in preliminary discussions or deliberations. (These meetings are often called “work sessions” or “workshop” meetings). OAR 199-050-0015(2)

Public Meeting Laws apply to:

Decision-Making Bodies. A decision-making body is a body with the authority to make decisions for the public body on policy or administration. A body meets this standard if its decision-making authority includes the power to exercise governmental power and act on behalf of the public body.

Advisory Bodies. An advisory body is a body with authority to make recommendations to a public body on policy or administration.

OAR 199-050-0010



Open to the Public

- All meetings of the governing body of a public body shall be open to the public and all persons shall be permitted to attend any meeting except as otherwise provided in ORS 192.610 to 192.705. ORS 192.630(1)
- A quorum of a governing body may not meet in private for the purpose of deciding on or deliberating toward a decision on any matter except as otherwise provided by ORS 192.610 to 192.705. ORS 192.630(2)



Notice

OAR 199-050-0040(3) requires a notice for meetings which are open to all members of the public to contain, at a minimum, the following information:

- Time, date and location of the meeting;
- The electronic link or telephone access information;
- A list of the principal subjects anticipated to be considered at the meeting (i.e., agenda). This requirements does not limit the ability to consider additional subjects;
- The name, telephone number, and email address of a person to contact to request an interpreter or other communication aids, or a notice that a sign language interpreter or other communication aids will be provided.

Remote Access

To extent reasonably possible, public bodies must make all meetings (excluding executive session) accessible remotely through technological means and provide opportunity for members of general public to remotely submit oral and written testimony if in-person oral and written testimony is allowed.

ORS 192.670(3)



Executive Session Notice

Same as regular meetings, plus:

- Must “identify the specific statutory citation and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization.
- If part of a regular, special or emergency meeting, “the presiding officer shall identify in open session the specific statutory provision and appropriate subsection and paragraph authorizing the executive session, as well as a general description of the statutory authorization.”

OAR 199-050-0040(3)(d)



Public Meeting Minutes

- Must include “a true reflection of the matters discussed at the meeting and the views of the participants” and the following:
 - All members of the governing body present;
 - All motions, proposals, resolutions, orders, ordinances and measures proposed and their disposition;
 - The results of all votes and the vote of each member by name (if 25 or fewer members);
 - The substance of any discussion on any matter; and
 - A reference to any document discussed at the meeting.

ORS 192.650(1)



Public Meeting Minutes

- All minutes or recordings must be available to the public “within reasonable time after the meeting.” ORS 192.650(1).
- School board meeting minutes are public records and need to be retained permanently. OAR 166-400-0010(9)



Executive Session Minutes

- Same content requirements (except ORS 332.061);
- Not required to disclose “if the disclosure of certain material is inconsistent with the purpose for which a meeting under ORS 192.660 is authorized to be held.”



Recording Meetings

- School districts, ESDs, community college districts and public universities are required to post video recordings of non-executive session meetings within seven days of the meeting;
- Posted to the public body's website or social media site;
- If facilities lack broadband Internet access, audio recording is sufficient;
- SB 1502 (2024);, Effective January 1, 2025;
- Does not apply to school districts with less than 50 ADMr;
- Does not apply to executive session.



Executive Session

ORS 192.610(1) Public Meeting Law “do[es] not prevent the governing body of a public body from holding an executive session during a regular, special or emergency meeting, after the presiding officer has identified the authorization under ORS 192.610 to 192.705 for holding the executive session.”

Executive Session

OAR 199-040-0020(1) “Executive session may only be held when permitted by a specific provision of ORS 192.660 or other state law authorizing executive session. The topic(s) discussed in an executive session must be limited to those topics expressly permitted by the specific provision under which the executive session was convened. Members of governing bodies may not discuss topics in executive session other than those delineated in [the law], even if the additional topics are related to the issue concerning which the governing body convened the executive session.”

Executive Sessions

- Can be held as part of a regular, special or emergency meeting;
- Can be held separate from any other agenda items;
- Public meeting requirements still apply:
 - Notice
 - Minutes
 - Location
 - Accessibility



Unique to Executive Sessions

- No final action or making any final decisions (can reach informal consensus, but no votes except ORS 332.061);
- News media allowed to attend except:
 - Labor negotiations (ORS 192.660(2)(d));
 - Student issues (ORS 332.061); or
 - Current litigation or litigation likely to be filed if the news media is a party to the litigation;
but should be instructed not to report;
- Board and any guests allowed to attend.



Santiam Canyon School District 129

Code: BDC
Adopted: 2/11/15
Revised/Readopted: 1/16/26

Executive Sessions

The Board may meet in executive session to discuss subjects allowed by statute but may not take final action except for the expulsion of a student and matters pertaining to or examination of the confidential records of the student.

An executive session may be included as an agenda item of an existing meeting in accordance with Board policy BDDC - Board Meeting Agenda or held as its own meeting. Proper notice is required.

If open session is held prior to the executive session, the presiding officer will announce the executive session by identifying the authorization under Oregon Revised Statute (ORS) 192.660 or ORS 332.061 for holding such session and by noting the subject of the executive session.

The Board may hold an executive session:

1. To consider the employment of a public officer, employee, staff member or individual agent.¹ (ORS 192.660(2)(a))
2. To consider the dismissal or disciplining of, or to hear complaints or charges brought against, a public officer², employee, staff member or individual agent who does not request an open hearing. (ORS 192.660(2)(b))
3. To conduct deliberations with persons designated by the governing body to carry on labor negotiations. (ORS 192.660(2)(d))
4. To conduct deliberations with persons designated by the governing body to negotiate real property transactions. (ORS 192.660(2)(c))
5. To consider information or records that are exempt by law from public inspection. (ORS 192.660(2)(f))

¹ This provision does not apply to the filling of a vacancy in elective office or on any public committee, commission or other advisory group; or for the consideration of general employment policies. Prior to holding an executive session under ORS 192.660(2)(a), the Board must ensure

- a. The vacancy has been advertised;
- b. Regular hiring procedures have been adopted;
- c. If hiring an officer, the public has had the opportunity to comment on the employment of the officer; and
- d. If hiring a chief executive officer, the Board has adopted hiring standards, criteria and policy directives in meetings open to the public in which the public has had the opportunity to comment on the standards, criteria and policy directives.

² To determine whether the individual involved is considered a public officer, consult with legal counsel.

6. To consult with counsel concerning the legal rights and duties of a public body with regard to current litigation or litigation likely to be filed. (ORS 192.660(2)(h))
7. To review and evaluate the employment-related performance of the chief executive officer of any public body, a public officer, employee or staff member who does not request an open hearing. (ORS 192.660(2)(i))
8. To consider matters relating to school safety or a plan that responds to safety threats made toward a school. (ORS 192.660(2)(k))
9. To consider matters relating to the safety of the governing body and of public body staff and volunteers and the security of public body facilities and meeting spaces. (ORS 192.660(2)(o))
10. To consider matters relating to cyber security infrastructure and responses to cyber security threats. (ORS 192.660(2)(p))
11. To review the expulsion of a minor student from a public elementary or secondary school. (ORS 332.061(1)(a))
12. To review matters pertaining to or examination of the confidential records of a student. (ORS 332.061(1)(b))

Members of the press may attend executive sessions except those matters pertaining to:

1. Deliberations with persons designated by the Board to carry on labor negotiations;
2. Hearings on the expulsion of a minor student or examination of the confidential records of a student; and
3. Current litigation or litigation likely to be filed if the member of the news media is a party to the litigation or is an employee, agent or contractor of a news media organization that is a party to the litigation.

If an executive session is held pursuant to ORS 332.061, the following shall not be made public: the name of the minor student; the issue, including the student's confidential records; the discussion; and each Board member's vote on the issue.

Minutes shall be kept for all executive sessions.

Content discussed in executive sessions is confidential except as provided by law. Board members and the media are instructed not to disclose information obtained in executive session except when specifically authorized to do so or as required by law.

END OF POLICY

STATE OF OREGON
DEPARTMENT OF JUSTICE

ATTORNEY GENERAL'S
PUBLIC RECORDS
AND
MEETINGS MANUAL



"Knowledge will forever govern ignorance.
And a people who mean to be their own governors, must arm
themselves with the power knowledge gives. A popular government
without popular information or the means of acquiring it, is but
a prologue to a farce or a tragedy, or perhaps both."
James Madison (1822)

ELLEN F. ROSENBLUM
Attorney General

June 2019

SAMPLE SCRIPT TO ANNOUNCE START OF EXECUTIVE SESSION

The [governing body] will now meet in executive session pursuant to ORS 192.660(____) [choose appropriate section(s) for *this* session], which allows the Commission to meet in executive session to [list activity(ies)] .

Representatives of the news media and designated staff shall be allowed to attend the executive session. All other members of the audience are asked to leave the room. Representatives of the news media are specifically directed not to report on or otherwise disclose any of the deliberations or anything said about these subjects during the executive session, except to state the general subject of the session as previously announced. No decision may be made in executive session. At the end of the executive session, we will return to open session and welcome the audience back into the room.

Questions?

- General Legal (PACE):
pacelegal@osba.org
- OSBA Policy: slewis@osba.org
- Oregon Government Ethics
Commission (OGEC):
(503) 378-5105
mail@ogec.oregon.gov



PACE
SAFETY • SERVICE • SAVINGS
A TRUST BUILT FOR STUDENTS





Governance vs. Management

Board & Superintendent role clarity

Governance vs. Management

Governance - BOARD

- Hires & evaluates Superintendent
- Sets Policy
- Budget adoption
- Program adoption
- Curriculum adoption
- Community engagement
- Informed oversight/monitoring

Management - SUPERINTENDENT

- Helps hire district staff
- ARs/policy implementation
- Budget spending
- Program implementation
- Curriculum recommendation
- Community engagement
- Providing data and information

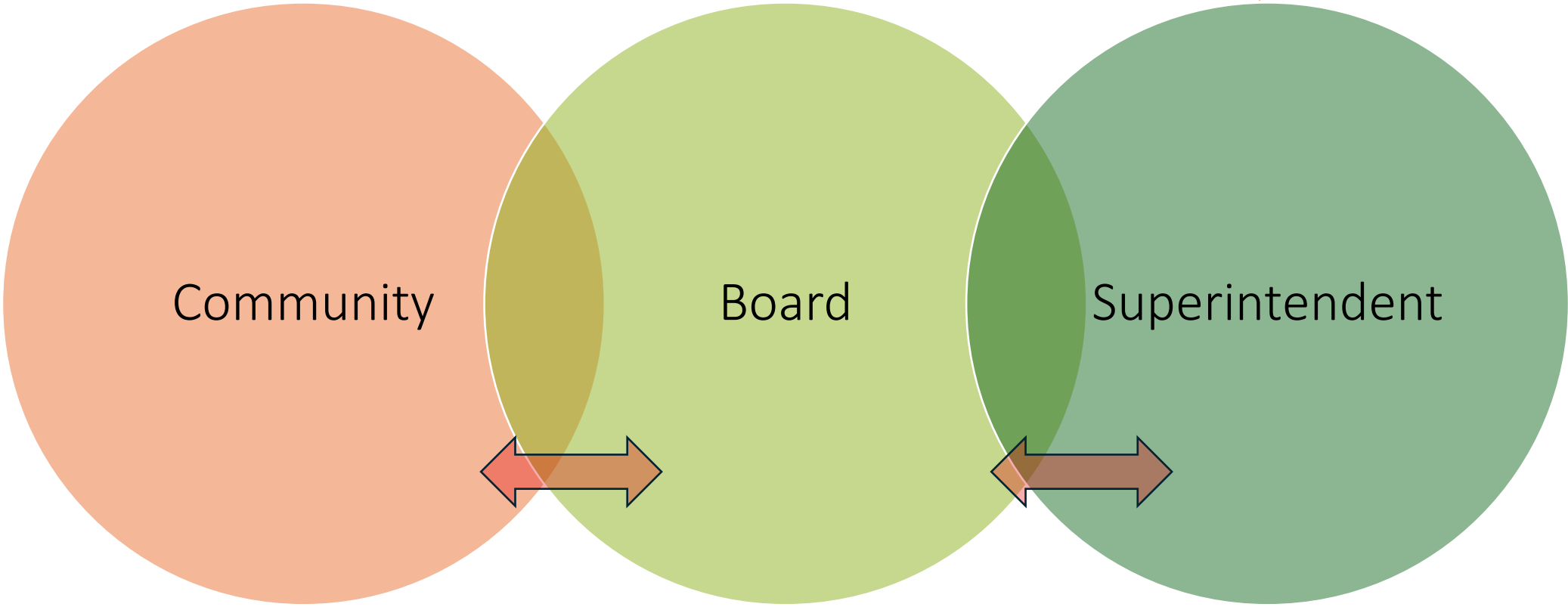


Community Engagement

Governance vs. Management Role

- Elected by the community
- Board hold the system accountable
- serves as interface between the community and district
- Often first point of contact
- May help inform community of student outcomes
- Help build trust

- Publicly leads the district
- Keeps community informed
- Shares and collects info, when needed
- Help build trust



Let's put this learning into
practice

Scenario: An upset staff member (who is also a parent) approaches you at the grocery store and asks if you can please help them with a complaint about their child's teacher. Their student's teacher has been assessing/grading them unfairly and the staff member believes it is retaliation for a tough parent-teacher conference from earlier in the year. They mention they have tried connecting with the teacher and have been unsuccessful, and now they fear retaliation in their own job.

Discussion:

- 1. As individual board member what can you say in this situation?**
- 2. What is your authority/individual board role here, (if any)?**
- 3. Are there any potential risks here for you as an individual board member. If yes, what could they be?**



Individual Authority & Role – Policy BBAA

- May express personal experience as their own and not the boards.
- Individual board members have no authority and cannot speak on behalf of the board unless authorized by the board by specific motion.
- Individual actions may unintentionally derail board work – e.g., complaint process; request for information; sharing of information; staff communication

Santiam Canyon School District 129

Code: BBAA
Adopted: 2/05/09
Revised/Readopted: 2/11/15; 9/14/16; 5/08/19
Orig. Code: BBAA

Individual Board Member's Authority and Responsibilities

An individual Board member exercises the authority and responsibility of their position when the Board is in legal session only.

A Board member has the authority to act in the name of the Board when authorized by a specific Board motion. The affirmative vote of the majority of members of the Board is required to transact any business. When authorized to act as the district's designated representative in collective bargaining, a Board member may make and accept proposals in bargaining subject to subsequent approval by the Board.

A Board member has the right to express personal opinions. When expressing such opinions in public, the Board member must clearly identify the opinions as their own.

Members will be knowledgeable of information requested through Board action, supplied by the superintendent, gained through attendance at district activities and through professional Board activities.

Members of the Board will adhere to the following in carrying out the responsibilities of membership:

1. Request for Information

Any individual Board member who desires a copy of an existing written report or survey prepared by the administrative staff will make such a request to the superintendent. A copy of the material may be made available to each member of the Board. Requests for the generation of reports or information which require additional expense to the district must be submitted to the Board for consideration.

2. Requests for Legal Opinions

A request for a legal opinion by a Board member, must be approved by a majority vote of the Board before the request is made to legal counsel. If the legal opinion sought involves the superintendent's employment or performance, the request should be made to the Board chair. Legal counsel is responsible to the Board.

3. Action on Complaints or Requests Made to Board Members

When Board members receive complaints or requests for action from staff, students or members of the public, such information is to be conveyed to the superintendent for action.

Santiam Canyon School District 129

Code: KL-AR
 Revised/Reviewed: 9/02/99; 8/12/15; 3/09/16;
 5/11/22
 Orig. Code: KL-AR

Public Complaint Procedure

Initiating a Complaint: Step One

Any member of the public who wishes to express a complaint should discuss the matter with the school employee involved. It is the intent of the district to solve problems and address all complaints as close as possible to their origin.

The Administrator: Step Two

If the complainant is unable to resolve a problem or concern at step one, within 5 working days of the meeting with the employee, the complainant may file a written, signed complaint with the principal. The principal shall evaluate the complaint and render a decision within five working days after receiving the complaint.

The Superintendent: Step Three

If Step 2 does not resolve the complaint within 10 working days of the meeting with the principal the complainant, if he/she wishes to pursue the action, shall file a signed, written complaint with the superintendent clearly stating the nature of the complaint and a suggested remedy. (A form is available, but is not required.)

The superintendent shall investigate the complaint, confer with the complainant and the parties involved and prepare a written report of his/her findings and his/her conclusion within 10 working days after receiving the written complaint.

The Board: Step Four

If the complainant is dissatisfied with the superintendent's findings and conclusion, the complainant may appeal the decision to the Board within five working days of receiving the superintendent's decision. The Board may hold a hearing to review the findings and conclusion of the superintendent, to hear the complaint and to hear and evaluate any other evidence as it deems appropriate. Generally all parties involved, including the school administration, will be asked to attend such meeting for the purposes of presenting additional facts, making further explanations and clarifying the issues.

The Board may elect to hold the hearing in executive session if the subject matter qualifies under Oregon Revised Statutes.

**Santiam Canyon
 School District 129**

Code: KL
 Adopted: 8/03/06
 Revised/Readopted: 8/12/15; 12/09/15; 3/09/16
 Orig. Code(s): KL

Public Complaints

The district will develop and implement effective means of resolving concerns voiced by employees, students and the public in order to reduce potential areas of complaints, and to establish and maintain recognized channels of communication.

The Board advises the public that the proper process for resolving complaints is as follows:

1. Teacher/Employee;
2. Principal;
3. Superintendent;
4. Board.

If your complaint addresses one or more of the issues identified below, you may use the complaint process available in any of the following policies and administrative regulations (AR):

1. Discrimination or harassment on any basis protected by law: Board policy AC, AC-AR;
2. Sexual harassment (staff): GBN, GBN-AR;
3. Sexual harassment (student): JBA, JBA-AR;
4. Hazing, harassment, intimidation, bullying, menacing or cyberbullying (staff): GBNA, GBNA-AR;
5. Hazing, harassment, intimidation, bullying, menacing, cyberbullying, teen dating violence or domestic violence (student): JFCF, JFCF-AR;
6. Sexual conduct with a student: Board policy JHFF, JHFF-AR;
7. Instructional resources/instructional materials: Board policy IIA, IIA-AR;
8. Compliance with state standards: Board policy LGA, LGA-AR;
9. Complaints regarding the Talented and Gifted Program (TAG): Board policy IGBBC, IGBBC-AR.

Any complaint about school personnel other than the superintendent will be investigated by the administration before consideration and action by the Board. The Board will not hear complaints against employees in a session open to the public unless an employee requests an open session.

**SANTIAM CANYON SCHOOL DISTRICT
 COMPLAINT FORM
 Please Print**

TO: District Office _____ (Name of School)

Person Making Complaint _____

Telephone Number _____ Date _____

Mailing Address: _____

Email Address: _____

Nature of Complaint _____

Who should we talk to and what evidence should we consider? _____

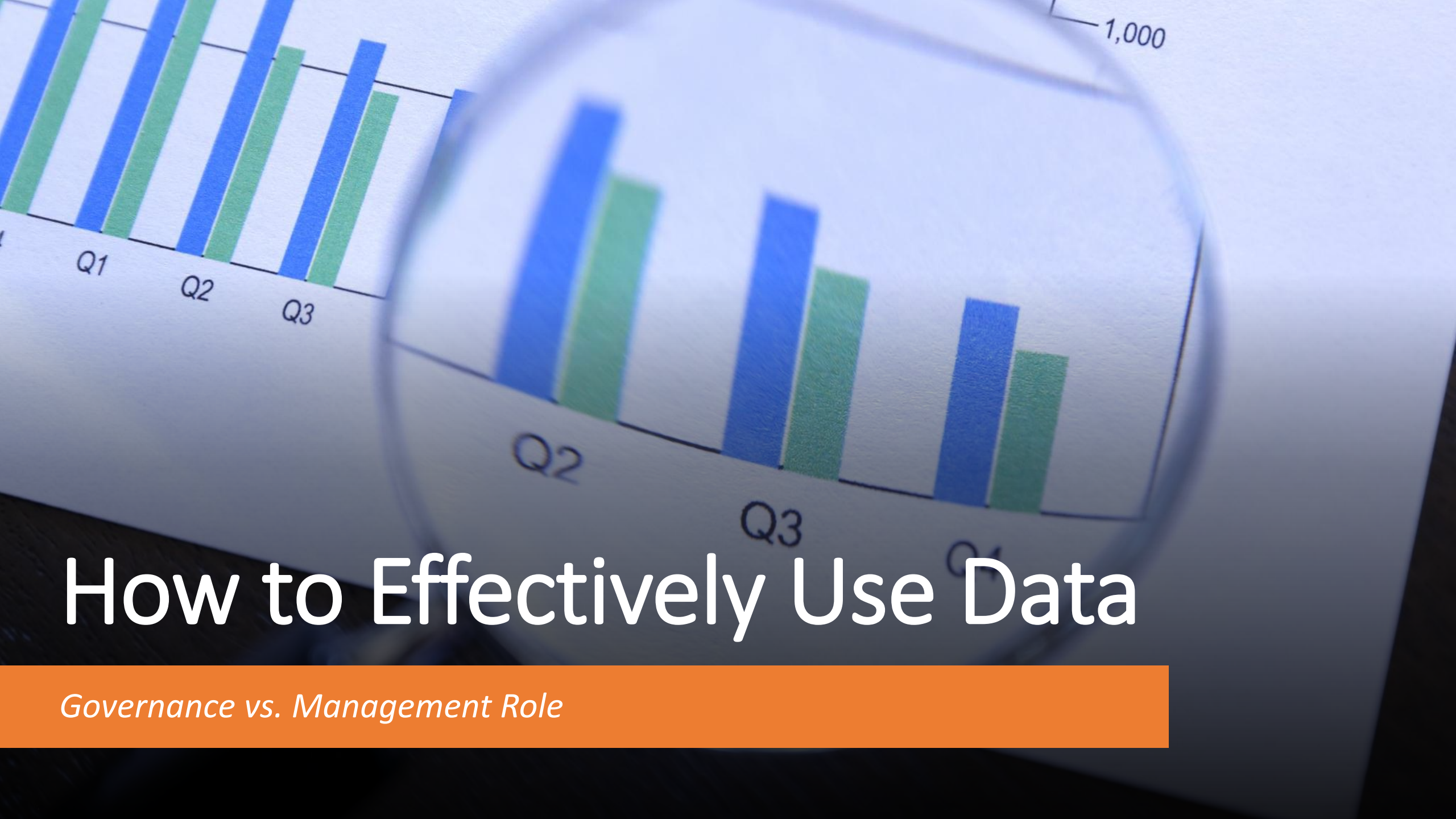
Suggested solution/resolution/outcome: _____

Signature: _____

Office Use: Disposition of Complaint: _____

 Signature: _____ Date: _____

cc: District Office



How to Effectively Use Data

Governance vs. Management Role

Scenario:

During a recent board presentation by the superintendent, a board member questioned that the data presented was not an accurate representation of how well students are performing. While the data provided a good global view of overall student success in the district, the board member wanted data that measured teacher effectiveness. They demanded that the data needs to be broken down further by individual classrooms and teachers in each school and grade level to determine if staff need more professional development trainings.

Discussion:

- 1. Is this the role of the board?**
- 2. Can an individual board member request this type of data/info?**
- 3. What is the potential impact here?**

Governance vs. Management

Board

- Hires & evaluates Superintendent
- Sets Policy
- Budget adoption
- Program adoption
- Curriculum adoption
- Community engagement
- Informed oversight/monitoring

Superintendent

- Helps hire district staff
- ARs/policy implementation
- Budget spending
- Program implementation
- Curriculum recommendation
- Community engagement
- Providing data and information

Board's Role: to use data as a tool for measuring progress



LOOK AT HIGH LEVEL DATA



STAY INFORMED ON
DISTRICT GOALS &
MEASURE PROGRESS



MAKE INFORMED
DECISIONS ON POLICIES,
BUDGET

How to Use Data to Evaluate Progress



ENSURE THE DATA
ALIGNS WITH THE
DISTRICT GOALS



LOOK FOR TRENDS
OVER TIME – ARE
OUTCOMES
IMPROVING,
DECLINING, STAYING
THE SAME



ARE THERE ANY
UNEXPECTED RESULTS



COMPARE ACROSS
GROUPS – WHAT DO
YOU SEE AMONG
SCHOOLS, GRADE
LEVELS, STUDENT
POPULATIONS)



IS THE DISTRICT ON
TRACK TO MEET
GOALS?



WHAT INTERNAL OR
EXTERNAL FACTORS
MAY HAVE IMPACTED
THE RESULTS



HOW DO RESULTS
COMPARE TO
STATEWIDE
BENCHMARKS?



ARE THERE ADDITIONAL
RESOURCES OR
SUPPORT NEEDED TO
ACHIEVE THE DISTRICT
GOALS?



Budget Spending

Governance vs. Management Role



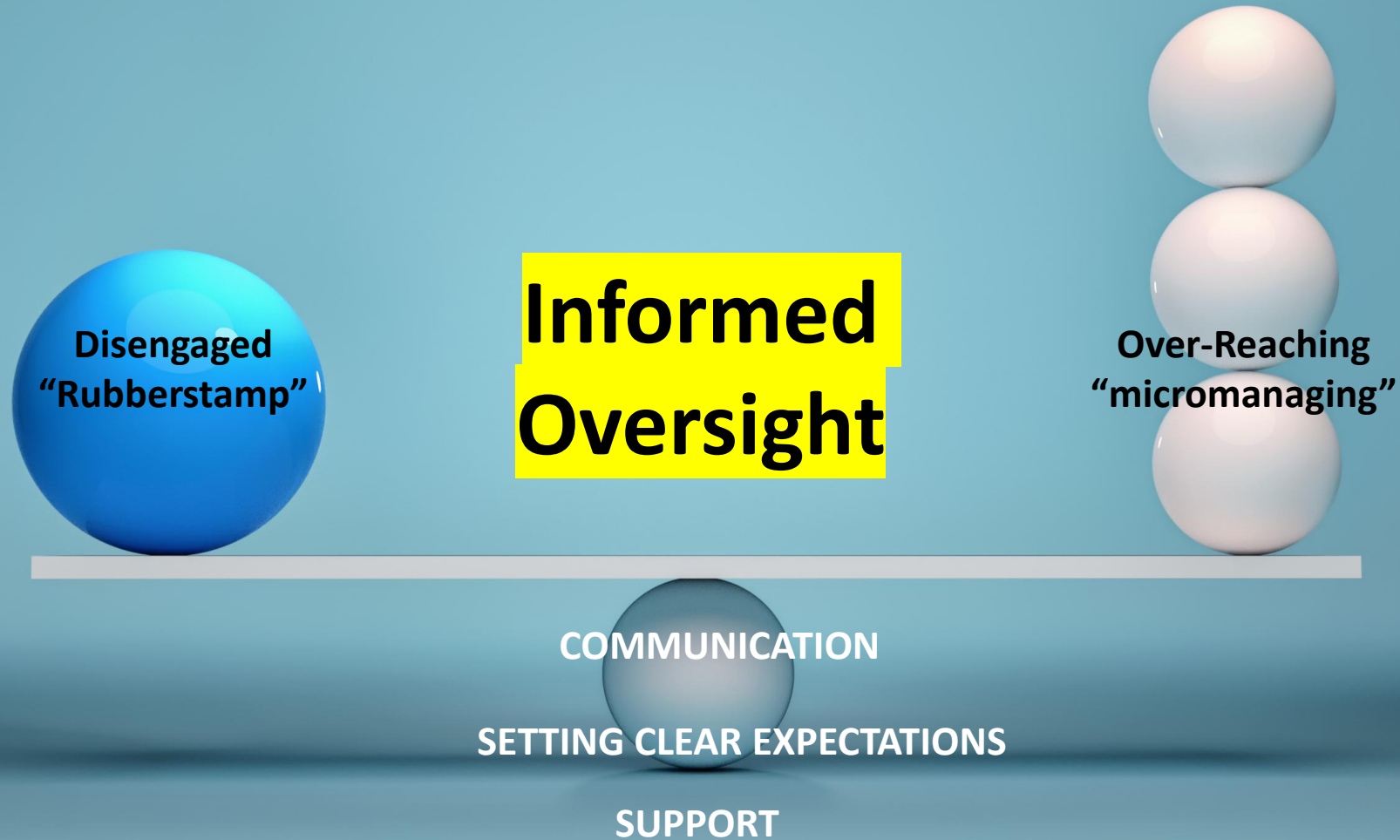
A board member gets several emails about transportation delays. In the board meeting they say, “I’m getting complaints that bus X is always late. What’s going on with that route?” “Does our current budget meet our needs.”

Scenario:

Discussion:

- Is it the role of the board to ask these types of questions (why or why not)?
- Should this matter be raised at board meeting (why or why not)?

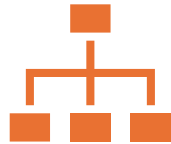
Balanced Governance



Board Authority & Role

- United vs. uniform
- Establish the direction – help define what success means for students and identify student needs.
- Hold the system and themselves accountable – e.g., superintendent evaluation, board self-evaluation, monitor student performance.
- Are student focused – look at data, ask questions, and make decisions on what will best impact student outcomes.
- Agree to disagree respectfully and don't undermine decisions – support the will of the board in the board room and outside the board room.
- Boards work together, deliberate and make informed decisions – share the single belief that ALL students can and will learn, are collaborative and open minded – everyone can share their perspectives and ideas with respect.
- Use some form of parliamentary procedure to make decisions in an orderly and structured manner.
- Understand and respect the role of the chair, superintendent, and administrative professional.
- Follow rules and regulations for public meetings and executive sessions.

What does Effective Board & Superintendent Collaboration Look Like?



Boards understand and respect the superintendent's management role and recommendations – board provides direction, Supt. manages day to day operations and implements the decisions and policies of the board.



Support and trust the Supt – assume no bad intent and ask for clarifications of process and procedures.



Set clear governance vs. management role expectations.
E.g., board operating agreements & board-superintendent operating agreements



No surprises – board and Supt. establish the superintendent's evaluation criteria and performance goals.

A photograph showing a concrete bridge over a deep, narrow ditch. The bridge deck is made of several large concrete slabs. One slab on the left side is missing, creating a large hole in the road surface. The bridge is surrounded by dense, lush green vegetation, including tall grasses and shrubs. The road surface is asphalt with a white dashed line down the center. The overall scene suggests a neglected or damaged infrastructure project in a rural or undeveloped area.

Don'ts – Pitfalls

Practices associated with negative impacts on student outcomes

“Low-Performing Boards”

Less time on student needs

Meetings less orderly

Less time spent on student achievement

Anecdotes and agendas

Members seek to advance their own agendas

Only vaguely aware of school improvement initiatives

Anecdotes and personal experiences drive decisions instead of data

Poor relationships

Less effective working relationships

Lack of respectful and attentive engagement

Some individuals take up too much airtime

Staff don't know the board

Micromanagement

Less focus on policy items

Less reliance on the executive for advice and input

External blaming

Refer to external pressures as main reason for lack of student success

Blaming communication and outreach barriers

Describe teachers, students, and families as cause of low performance



Superintendent Evaluation

Why evaluate the superintendent?

01

To build good
board-
superintendent
relationships

02

Accountability

03

Provide
constructive
feedback to drive
improvement

04

Celebrate
success



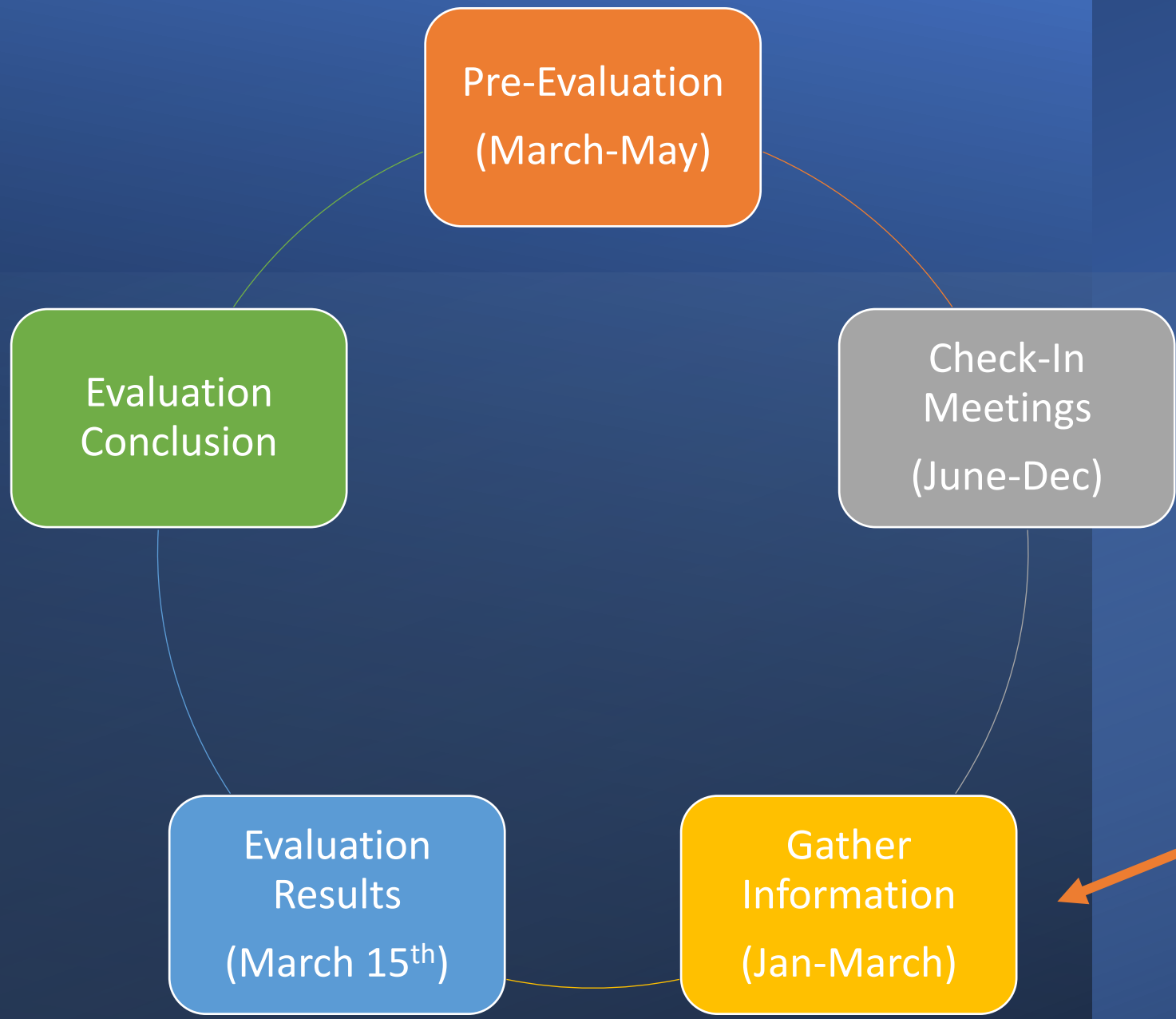
THE TOOL



CRITERIA -
STANDARDS; GOALS



TIMELINE



Board is in this phase of the cycle





Gathering Information Phase

Individual Board
Evaluations due
Monday, March 23

Superintendent
Self-Evaluation &
artifacts of
evidence

Executive Session – April 7th

- Superintendent self-evaluation & artifacts of evidence presented
- Discuss summative report & come to consensus on superintendent ratings & comments
- Share draft report with the superintendent

Superintendent Summative Evaluation Report

Evaluation Rating Key

4 = ACCOMPLISHED PERFORMANCE (*performance is routinely outstanding & acts as a model for others*)
3 = EFFECTIVE PERFORMANCE (*performance is consistent*)
2 = DEVELOPING (*performance is not consistent & occasionally met*)
1 = INEFFECTIVE (*performance is not met*)

Standard 1 – Visionary district leadership	
Board Rating	
Comments:	

Standard 2 – Ethics and professional norms	
Board Rating	
Comments:	

Standard 3 – Inclusive district culture	
Board Rating	
Comments:	

Standard 4 – Culturally responsive instructional leadership and improvement	
Board Rating	
Comments:	

Standard 5 – Communication and community relations	
Board Rating	
Comments:	

Executive Session – April 13

Meet with the superintendent to clarify questions about the report

Review public summary – drafted by OSBA consultant

Superintendent exits executive session

Board discusses and makes changes, if needed

Board exits executive session

Board adopts summative evaluation report in **open session**

Summative Report filed in superintendent's personnel file

Public summary read by board chair

Two Separate Docs.

SAMPLE EVALUATION SUMMARY

Below is a sample summary of a board's evaluation of its superintendent.

The board of directors of the (name) school district has completed the annual evaluation of Superintendent (name) for (year). All (number) board members have served on the board for at least one full year and have been able to observe and be a part of the successes achieved this year.

The evaluation focused on 1) eight professional standards and 2) superintendent goals.

Regarding the eight professional standards, we determined that Superintendent (name)'s performance was exemplary in the areas of visionary leadership, communications and community relations, and effective management. In the areas of policy and governance, curriculum planning and development and labor relations, the board felt his/her performance was strong. Instructional leadership, resource management and ethical leadership all received a rating of average.

The board determined that Superintendent (name) has done an outstanding job of attaining the goal set by the board and superintendent in August of last year to update and align the elementary language arts and reading curriculum. His/her success at achieving the goal of improving staff morale and retaining professional staff was rated good. Success in meeting the third goal, raising high school math competency and performance on tests, was also rated good.

[The board and superintendent chose to distribute a targeted feedback survey to members of the staff and community for feedback on his/her performance. The results of this survey were one source of data in the consideration of the performance of the superintendent. We have received the results of that feedback, which reflects that staff morale has improved and that significant curriculum results have been achieved at the elementary level. He/she also shared with us his/her desire to further improve staff morale and focus on bringing the community together in support of the schools.]

We will be working with Superintendent (name) over the next several weeks to develop goals for the superintendent aligned with our district goals and look forward to working together to continue the success of our district.

Superintendent Summative Evaluation Report

Evaluation Rating Key
4 = ACCOMPLISHED PERFORMANCE (<i>performance is routinely outstanding & acts as a model for others</i>)
3 = EFFECTIVE PERFORMANCE (<i>performance is consistent</i>)
2 = DEVELOPING (<i>performance is not consistent & occasionally met</i>)
1 = INEFFECTIVE (<i>performance is not met</i>)

Standard 1 – Visionary district leadership	
Board Rating	
Comments:	

Standard 2 – Ethics and professional norms	
Board Rating	
Comments:	

Standard 3 – Inclusive district culture	
Board Rating	
Comments:	

Standard 4 – Culturally responsive instructional leadership and improvement	
Board Rating	
Comments:	

Standard 5 – Communication and community relations	
Board Rating	
Comments:	

OSBA Resources

Governance Tools

- Superintendent evaluation
- Board self-assessment
- Board operating agreement
- Communication protocols
- Board/superintendent operating agreement
- Parliamentary Procedure

EXAMPLE 2 SCHOOL BOARD OPERATING AGREEMENT

BOARD ROLES & RESPONSIBILITIES

1. Focus on governance: policy-making, strategic planning and evaluation (curriculum, district performance and superintendent).
2. Uphold the legal, compliance and confidentiality requirements on all matters arising from board meetings and executive session.
3. Recognize the role of the chair to speak for and about the board to the press and public groups. Recognize the role of the chair to convene meetings, execute documents as appropriate, and develop the agenda with the vice chair and superintendent.
4. The board and superintendent will participate annually in establishing goals and objectives for themselves and the district.
5. The board will act as ambassadors to the schools, the community and the district.

HOW WE OPERATE & MAKE DECISIONS

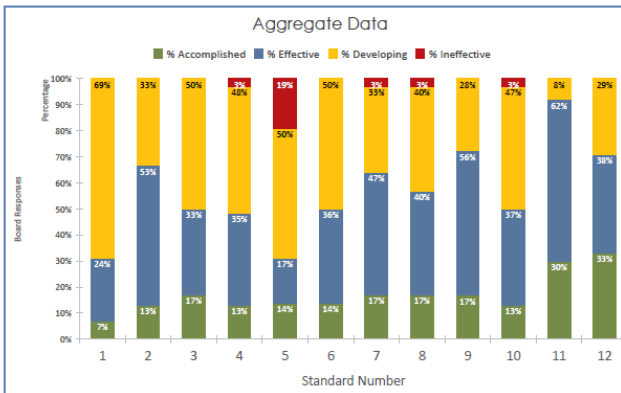
6. Make decisions as a whole board only at properly called meetings.
7. Support decisions of the majority. Once a decision is made, members will support the decision of the majority.
8. Two (three, depending on policy) board members must agree before an item is placed on a meeting agenda.
9. Start and end meetings on time.
10. Notify the school administration before visiting a school in the role of school board member.

HOW WE COMMUNICATE

11. Communicate directly with the superintendent when information is needed or a question arises. Specific questions concerning information contained in the board packet may be addressed to the person providing the information.
12. The chair responds to group email sent to the board.
13. Be mindful that you represent the board in public and that no individual board member has the authority to speak for the board.
14. Board members will communicate with one another should an issue or problem develop between them.



Balanced Governance: Aggregate Data



Balanced Governance Standards

- 1: Vision-Directed Planning
- 2: Community Engagement
- 3: Effective Leaders
- 4: Accountability
- 5: Using Data for Continuous Improvement and Accountability
- 6: Cultural Responsiveness
- 7: Culture and Climate
- 8: Learning Organization
- 9: Systems Thinking
- 10: Innovation and Creativity
- 11: Board Member Conduct, Ethics and Relationship with Superintendent
- 12: Budgeting and Financial Accountability



BOARD DEVELOPMENT



Kristen Miles
Director of Board
Development



**Janet Avila-
Medina**
Board
Development
Specialist



Vince Adams
Board
Development
Specialist



Jenn Nelson
Board
Development
Specialist



Reggie Glenn
Board Development
Senior Administrative
Analyst



Contact us!



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EMAIL

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1-800-578-6722
503-588-2800

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1-800-578-OSBA



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Log in

Welcome to OSBA/PACE Membership Portal

This portal can be used to:

- Manage your contact information and school district information
- View memberships and subscriptions
- Register for OSBA and PACE events
- Set your email preferences

After you are logged into the portal, you can use the menu at the top of the screen to navigate through the system.

We have sent all members emails containing their default usernames and passwords. Please update/change your password once you log into the system by clicking on information under the contact tab.

If you have any questions please contact the OSBA Office at 800-578-6722.

NEWS STORIES, COMMUNICATIONS SUPPORT, RECOGNITION RESOURCES



STORIES FROM SCHOOLS

Stories from Schools shares reports from districts about the good things going on in their communities. Stories can be submitted to communications@osba.org with "#OregonStrong" in the subject line.



Jewell School District
[School Attendance is a Family Affair](#)

OREDNEWS

[View this email in your browser](#)

OREGON PUBLIC BROADCASTING
School funding, college costs and book bans: What did lawmakers do for young people in Oregon's 2025 legislative session?



OREGON SCHOOL BOARD MEMBER of the YEAR

DO YOU KNOW WHO COULD BE THE 2025 OREGON SCHOOL BOARD MEMBER OF THE YEAR?

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Conferences



Bonds, Ballots and Buildings Conference

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OSBA Annual Convention

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Summer School Sessions

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BOARDSMANSHIP FOR BEGINNERS

LEVEL UP

2026-27 COHORT





Year One: Learn the Job
March 3, 2026 – June 30, 2026

Year Two: Make an Impact
July 1, 2026 – June 30, 2027

- Partner with a mentor
- Quarterly cafes
- One in-person training
- Free registration - Summer School Session
- Free registration - Annual Convention



Please share one new takeaway or appreciation from today's training

**Please fill
out our
feedback
survey!**



Photo Credits

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- OSBA: <http://www.osba.org/>
 - **Alsbury, T. L., & Gore, P. (2015).** Improving local school board governance: A Balanced Governance approach. Cambridge, MA: Harvard Press.
 - **Alsbury, T. L. (2008).** (Ed.) *The future of school boards governance: Relevancy and revelation.* Lanham, MD: Rowman & Littlefield.