



ASBO INTERNATIONAL'S
FUTURE'S TASK FORCE

Recommendations
December 2005



ASBO INTERNATIONAL'S FUTURE'S TASK FORCE

Recommendations

December 2005

TABLE OF CONTENTS

Introduction	i
ASBO International's Future's Task Force	ii
A. Streamline ASBO International's Governance Process	
1. Streamline/revise ASBO International's bylaws and policies to allow for a fast paced revision of process	1
2. Review the regionalization of ASBO International's Board of Directors	1
3. Determine if current ASBO International mission statement and strategic framework meets the needs of the Association	1
4. Review the complete governance structure of ASBO International including the number of Board members, the composition of the Board, and the purpose of the Executive Committee	1
B. Image of the School Business Official and ASBO International	
1. Increase awareness of what a school business official is by stressing the importance of the position and promoting the image of the school business management profession by creating an <u>aggressive marketing strategy</u> that includes additional staff and resources	2
2. Increase the advocacy for the school business management profession and all ASBO International members by becoming more active in governmental/administrative decisions and by becoming more proactive than reactive	2
3. Develop strategies to increase the Association's relevance especially for future members with changing demographics	2
4. Review the Association name	2
5. Redesign the Association logo	3
6. Enrich the global image of school business management by increasing international membership, programs and partnerships	3

7. Expand the legislative initiative by creating a full-time lobbying position for the Association with appropriate resources 3
8. Develop a Legislative Conference to assist affiliates to understand the legislative process 3
9. Expand partnering with other associations to enhance professional development activities including non-education associations 4
10. Develop a DVD on the profession that can be distributed to ASBO International members, superintendents, school board members, associations (education and non-education) and universities 4

C. Professional Credentialing

University of ASBO

1. Create the University of ASBO International concept based on the ASBO International Professional Standards 5

School Business Official Certification

2. Create a program/process to assist affiliates who strive to implement a certification program 5
3. Evaluate the potential for creating an international certification program sponsored by ASBO International 5

National Accreditation

4. Seek national accreditation for ASBO International's Professional Standards 5

ASBO International's Professional Registration Program

5. Revise current ASBO International professional registration program 6
6. Create a more involved/rigorous criteria for approval based on the ASBO International Professional Standards 6
7. Potentially tying professional registration program to an international certification process 6

D. Strengthening ASBO International Affiliates

Paid Contact in Each Affiliate

1. Create an ASBO International paid liaison position with each affiliate 7

Mentoring for Affiliates Without Executive Directors

2. Create a strategy to assist/mentor affiliates without executive directors 7

E. Annual Meeting Issues

1. Implement a 4-year rotation schedule for the ASBO International Annual Meeting selected by the ASBO International Board of Directors 8
2. Consideration of a Canadian city should be in the rotation every 10 years 8
3. Timing of the Annual Meeting 8
4. Content of the Annual Meeting should be reviewed 8

F. Multiple Tiers of Membership

1. Create multiple tiers of membership levels and membership dues to include classified staff 9

G. Leadership Skills

1. Create leadership development opportunities for the membership 10
2. Expand the Eagle Institute by developing a Leadership Academy 10
3. ASBO International committee chair training 10

H. Member Business Service Center

- 1. Create a member business service center 11

I. Unified Dues

- 1. Investigate the implementation of unified dues that would create membership in an affiliate and ASBO International simultaneously 12

J. Explore Strategic Partnerships with Other Professional Associations/Organizations

- 1. ASBO International should review the potential of merging with other school business management associations 13

K. Sustainability/Revenue Generation

- 1. Create a revenue generation strategy to sustain new programs and future endeavors 14

L. Continue Review of the Future

- 1. ASBO International must continue to look into the future to assure success 15

INTRODUCTION

The Association of School Business Officials International's Board of Directors established the Future's Task Force in October of 2004. At that time, I was asked to chair the task force, and Pam Deering, ASBO International Past President from Oklahoma, was named the vice chair. In December of 2004, the members of the task force were chosen on a geographic basis and by their years of service in the school business management profession.

The purpose of the task force was to review the ASBO International direction and programs for the next five to ten years. One key element to be discussed was the changing of member demographics in the years ahead, and how ASBO International must meet the challenges of the future. The task force was asked to complete their work and provide a report by the 2006 ASBO International Leadership Conference in Pittsburgh.

During 2005, the task force had seven conference calls, a two-day meeting in Indianapolis, and a final meeting during the ASBO International Annual Meeting in Boston. At the July 15-16 Indianapolis meeting, the task force forged the recommendations that are contained in this document. Dr. Ivan Wagner was the facilitator for this meeting as the task force members proposed new programs and revisions to current activities.

The recommendations are not in priority order. The task force members believe that it is the responsibility of the ASBO International Board of Directors to review the recommendations, and then determine what areas should be implemented.

I would like to thank the members of the task force for their honesty, time and efforts during this project. It was my pleasure to work with such a dynamic group of school business officials. Further, appreciation is given to Anne Miller and Stephanie Riffle of the ASBO International staff for their assistance in task force activities.

The Future's Task Force believes that the recommendations in this report will provide direction for ASBO International's Board of Directors and staff. Now is the time to make the decisions that will assure ASBO International is the *voice of the school business management profession* in the future.

Dennis L. Costerison
Chair, Future's Task Force
Executive Director
Indiana ASBO
December 2005

ASBO INTERNATIONAL'S FUTURE'S TASK FORCE

Chair

Dennis Costerison
Executive Director
Indiana ASBO
Indianapolis, Indiana

Vice Chair

Pam Deering
Assistant Superintendent for Fiscal Services
Midwest City Public Schools
Midwest City, Oklahoma

Members

Aaron Beaulieu
Associate Supt. of Operational & Financial Services
Pitt County Schools
Greenville, North Carolina

Amador Garza
Executive Director of Facilities & Maintenance
Northeast Independent School District
San Antonio, Texas

Brian Greene
Superintendent of Business
Thames Valley District SB
London, Ontario, Canada

Marilyn Hirth
Associate Professor
Purdue University
West Lafayette, Indiana

Jaclin Horrocks
Business Coordinator
Owen J. Roberts School District
Pottstown, Pennsylvania

Darren Muci
Division Director of Operations
Unified School District 259
Wichita, Kansas

Susan Murai
Director of Child Nutrition Services
Marysville Joint United School District
Marysville, California

Carlos Patino
Business Manager
Lincoln, BA
Buenos Aires, Argentina

George Perry
Executive Director
New York State ASBO
Albany, New York

Kay Watson
Assistant Superintendent of Business & Finance
Fremont County School District
Shoshoni, Wyoming

Ex Officio

Melody Douglas
Chief Financial Officer
Kenai Peninsula Borough School District
Soldtna, Alaska
(ASBO International Board Liaison to Task Force)

Ronald Everett
Executive Director
Illinois ASBO
DeKalb, Illinois
(ASBO International Membership Committee Chair)

Anne Miller
Executive Director
ASBO International
Reston, Virginia

Jim Rowan
Chief Financial Officer
Talawanda School District
Oxford, Ohio
(ASBO International Board Liaison to Membership Committee)

Edie Williams
Director of Finance
Richmond County Public Schools
Warsaw, Virginia
(ASBO International Membership Committee Vice Chair)

ASBO INTERNATIONAL'S FUTURE'S TASK FORCE



Recommendations

A. Streamline ASBO International's Governance Process

- 1. Streamline/revise ASBO International's bylaws and policies to allow for a fast paced revision of processes**
Recently the ASBO International bylaws and policies have been reviewed and unnecessary/repetitive language has been deleted. This is a good first step, but the guidelines for operating ASBO International must be streamlined to assure quick response to member and profession needs. Timelines must be revised to allow rapid response to pressing issues.

- 2. Review the regionalization of ASBO International's Board of Directors**
The election of ASBO International Board of Directors on a regional basis should be reviewed. Regionalization will assure representation from all geographic locations of ASBO International members. In this review, a Director position from the international community should be a priority.

- 3. Determine if current ASBO International mission statement and strategic framework meets the future needs of the Association**
The mission statement and strategic framework for any organization should be the backbone of the organization and reviewed on an annual basis. ASBO International must guarantee that future plans meet the needs of a changing and diverse membership.

- 4. Review the complete governance structure of ASBO International including the number of Board members, the composition of the Board, and the purpose of the Executive Committee**
Is there a need for more or less members of the ASBO International Board of Directors? Should the number of officers increase or decrease? Is there a need for targeted international membership on the Board? Is regionalization a concept to embrace? Should the Executive Committee have more or less power? Should the Board receive more leadership training? The leadership of the Association is key to implementing any plan in the future. These and other questions need to be reviewed to assure the strong leadership needed to make changes in ASBO International's future direction.

B. Image of the School Business Official and ASBO International

- 1. Increase awareness of what a school business official is by stressing the importance of the position and promoting the image of the school business management profession by creating an aggressive marketing strategy that includes additional staff and resources**

It is of the utmost importance to enhance the ASBO International membership as professional leaders and not just “bean counters”. School business officials are an integral part of the educational leadership team. School board members, superintendents, parents, legislators, business leaders, the media, etc. need to understand the importance of ASBO International members. An aggressive marketing strategy must be created to increase this awareness.

- 2. Increase the advocacy for the school business management profession and all ASBO International members by becoming more active in governmental/administrative decisions and by becoming more proactive than reactive**

On school business management matters, ASBO International must be the voice for the profession. Through committees, additional staff, or the reassignment of current staff, ASBO International needs to become more involved with decisions that impact the profession. In order to be the advocate that the membership desires, ASBO International has to become more active in governmental/administrative decisions. Issues must be dealt with before they occur. ASBO International must take a proactive stance on issues that impact the membership.

- 3. Develop strategies to increase the Association’s relevance especially for future members with changing demographics**

The future members and leaders of this Association are going to come from different backgrounds and cultures than the current “baby boomers” who dominate the Association membership. ASBO International must create ways to meet and understand their needs. Examples of how to meet these needs would include the Bridges of the Future participants meeting at each Annual Meeting and/or the creation of a committee of members who have less than five years as ASBO International members to discuss future expectations. What ideas would these individuals have regarding recruiting and retaining members? What programs/services (current and new) are needed to keep them as members?

- 4. Review the Association name**

What is a school business official? What does that title mean to the public, the media, legislators and other school personnel? Is there a better name that depicts what ASBO International members do? It is important for the ASBO International Board to take the time to determine answers to these questions. If image is a problem, the Association name is a good place to start.

- 5. Redesign the Association logo**
The design of the Association logo has not changed for years. A modern logo is another opportunity to change the Association image. This recommendation would be a partner to the recommendation regarding the review of the Association name.
- 6. Enrich the global image of school business management by increasing international membership, programs and partnerships**
To be a truly “international” organization, ASBO International must enhance the global image of the profession. It is highly recommended that strategies be prepared to increase the membership effort, increase the program offerings and enhance the partnership opportunities with members and affiliates outside of the United States. Currently, approximately 1% of the total ASBO International membership is from outside of the United States and Canada. There is a tremendous opportunity to increase the visibility of ASBO International and the profession by actively marketing to the international community. This recommendation will require additional staff and resources, but it is critical if ASBO wants to be a player in the global community.
- 7. Expand the legislative initiative by creating a full-time lobbying position for the Association with appropriate resources**
Advocacy for the membership is a most important element of any organization. The actions of the U.S. Congress, Department of Education, and other governmental agencies have significant impacts on the public schools and school business management. ASBO International must be more involved in the creation of legislative bills and governmental rules. A proactive stance is needed to be the advocate that the membership requires. The creation of a full-time lobbying position with appropriate support staff is the first step in moving to this advocacy position. Both veteran and new ASBO International members have stressed the need for additional legislative/governmental activities. It is understood that at this time, this recommendation is strictly a United States member issue. Consideration should also be given to legislative activities benefiting international members.
- 8. Develop a Legislative Conference to assist affiliates to understand the legislative process**
Understanding the legislative process is a needed asset in order to deal with key policy issues. ASBO International needs to make sure that the membership is prepared to function in the political atmosphere of their national and local capitals. A Legislative Conference should be designed to meet all member needs for information and action plans when dealing with elected officials.

9. Expand partnering with other associations to enhance professional development activities including non-education associations

ASBO International must continue to reach out to other organizations to seek common goals. There should be an expansion of the partnering with other educational associations specifically for professional development activities. Further, non-education associations such as the National Chamber of Commerce, National Farm Bureau, etc. should be contacted to see if partnerships can be formed.

10. Develop a DVD on the profession that can be distributed to ASBO International members, superintendents, school board members, associations (education and non-education) and universities

To enhance the image of ASBO International members and the profession, a DVD should be developed depicting what is a school business official, the job description of a school business official, and what are his/her responsibilities. This would be a marketing strategy that should be distributed to educators and non-educators.

C. Professional Credentialing

University of ASBO International

1. Create the University of ASBO International concept based on the ASBO International Professional Standards

ASBO International must become the answer for training school business professionals. Today's ASBO International member has grown up with the advances of technology and future members will not know a world that did not include the Internet. ASBO International should create comprehensive on-line education modules based on the ASBO International Professional Standards that would be available to all members. The program, "University of ASBO International", will provide training that is not offered by universities. It should be a real world professional development experience. The curriculum for this endeavor should be similar to university courses and provide general and affiliate-specific offerings. Those who complete the course should be recognized for their achievement at the local, affiliate and international levels. This program will require additional resources and staff.

School Business Official Certification

2. Create a program/process to assist affiliates who strive to implement a certification program

Certification of school business officials is a most important aspect of the profession. Several affiliates do not have a state, provincial or country sponsored certification program. ASBO International should develop a program that outlines the procedures/process for a successful certification program. This information should be made available to all affiliates with appropriate staff support.

3. Evaluate the potential for creating an international certification program sponsored by ASBO International

At the current time, the viability of ASBO International sponsoring an international certification program for all ASBO International members has numerous issues. To truly look into the future of the Association, the possibility of creating an international certification program should be evaluated including legal and tax implications. This recommendation has the potential of creating a niche for ASBO International as the organization of choice for school business management.

National Accreditation

4. Seek national accreditation for ASBO International's Professional Standards

In order to be a truly professional organization, ASBO International should seek national accreditation for the ASBO International Professional Standards. At one time, ASBO International's standards were accredited by a national organization. National accreditation would be a major boost for the image of the Association.

ASBO International's Professional Registration Program

5. Revise current ASBO International professional registration process

ASBO International has offered a professional registration program since 1964. The current process has few requirements for the initial registration, and is not viewed by new members as a valuable program. Therefore, current professional registration procedures need to be revised to make the designation relevant to the membership.

6. Create a more involved/rigorous criteria for approval based on the ASBO International Professional Standards

The criteria for receiving the initial ASBO International professional registration certificate needs to be increased to make the designation a recognition of school business management knowledge. A new criteria needs to be developed based on the ASBO International Professional Standards. This would include professional development activities and leadership roles. The current renewal process has some of these elements, but the program needs to be enhanced to assure that the designation truly depicts a professional leader.

7. Potentially tying professional registration program to an international certification process

Future consideration should be given to tying the ASBO International professional registration program to an international certification process if such a program is created by ASBO International. This would definitely make the professional registration program stronger and more credible to the membership.

D. Strengthening ASBO International Affiliates

Paid Contact in Each Affiliate

1. Create an ASBO International paid liaison position with each affiliate

ASBO International should consider designating a paid liaison in each affiliate to enhance the visibility of the Association. This person could be a retiree or consultant who could perform specific duties for ASBO International with an affiliate. These individuals would be accountable to ASBO International and perform services at the will of ASBO International. Job responsibilities would be determined by ASBO International.

Specifically, examples of responsibilities of the paid ASBO International liaison are as follows:

- ◆ *Further develop member relations between affiliates and ASBO International by constant contact with affiliate executive directors and presidents.*
- ◆ *Enhance member recruitment and retention by increasing the communication with members.*
- ◆ *Expand and promote ASBO International professional development activities in each affiliate.*
- ◆ *Assist in the creation of mentoring programs in each affiliate.*

Mentoring For Affiliates Without Executive Directors

2. Create a strategy to assist/mentor affiliates without executive directors

Only 27 affiliates have full-time or part-time executive directors. The remaining affiliates have various procedures for conducting their association business with the majority utilizing their officers. The great strength of ASBO International is the continuous networking and willingness to assist our peers. Therefore, ASBO International should create a program to assist and mentor any affiliate who requests assistance. This could be assisting with strategic planning, professional development activities, budgeting, non-dues revenue sources, membership recruitment and retention, board development, etc.

An excellent resource for this program would be the current and retired affiliate executive directors. Their experience and expertise regarding association management would be invaluable in the development and implementation of this program.

E. Annual Meeting Issues

1. Implement a 4-year rotation schedule for the ASBO International Annual Meeting selected by the ASBO International Board of Directors

The location of the ASBO International Annual Meeting is a key ingredient in whether a member attends. Even though the professional development opportunities at the Annual Meeting are very timely and relevant, many members do determine their attendance based on location. Therefore, the ASBO International Board of Directors should review their current selection process and strongly consider a rotation of sites that the membership deem desirable. It is recommended that a 4-year rotation be considered. The determined locations should be selected on a basis of service to the membership and providing the greatest return for the Association. A short rotation of sites will provide ASBO International with the leverage to work with convention centers and hotels to receive better rates.

2. Consideration of a Canadian city should be in the rotation every 10 years

In the past, ASBO International attempted to hold the Annual Meeting in a Canadian city every ten years. It is recommended that a Canadian city be included in the rotation of Annual Meeting locations.

3. Timing of the Annual Meeting

The ASBO International Annual Meeting has been traditionally in the fall of the year, specifically in October or November. As the ASBO International membership evolves, is the timing of the Annual Meeting still appropriate? The ASBO International Board of Directors and staff should review when the Annual Meeting is held knowing that any major change will have a “domino” effect on all ASBO International activities.

4. Content of the Annual Meeting should be reviewed

The professional development opportunities and the overall content of the Annual Meeting should be reviewed by the ASBO International Board of Directors and staff. Many members are seeking out other conferences to meet their professional needs. ASBO International should move forward with a rigorous program to assure that the Annual Meeting continues to be the location of choice for school business management professional development. Issues to be considered to increase the Annual Meeting content would include leadership courses, core sessions on school business management and specific sessions on topics that should include transportation, school nutrition, facilities, human resources, risk management, etc.

Further, ASBO International should review how technology can influence the Annual Meeting content and presentation. It is recommended that a thorough review of how other professions and organizations are using technology to enhance their professional development, such as utilizing virtual exhibits and programs.

F. Multiple Tiers of Membership

1. Create multiple tiers of membership levels and membership dues to include classified staff

Currently, ASBO International membership does not delineate between certified and non-certified staff. There is a vast number of potential members for the Association who do not have a college degree but are responsible for school business management functions. These individuals may not see ASBO International as their association of choice. Included in this group would be those involved with transportation, school nutrition, payroll, accounting, purchasing, plant operation and maintenance, etc. Further, superintendents in small school districts could benefit from ASBO International membership, but again they do not see ASBO International as their association. ASBO International needs to pursue increasing membership by reaching out to these individuals who are deeply involved with school business management functions, but who are not the chief financial officer.

In order to pursue this potential membership, it is recommended that different tiers of membership and dues structure be created. The determination of membership categories should include an evaluation of such issues as job position, job responsibilities, school district size, and salary level.

Finally, ASBO International needs to develop strategies to meet the needs of these potential members. Their expectations will be different. Professional development activities and other services will need to be updated to service the new members.

G. Leadership Skills

1. Create leadership development opportunities for the membership

ASBO International members need to be recognized as leaders at the local, state and international levels. ASBO International should develop comprehensive programs to provide these opportunities for professional and personal growth. Further, ASBO International should develop programs that will assure strong leadership for the Association in the future.

ASBO International should create professional development activities on leadership skills (ethics, working relationships, time management, etc.) that will enhance the abilities of members. These programs should be made available on affiliate, regional and an international basis. Programs could be provided during the Annual Meeting.

2. Expand the Eagle Institute by developing a Leadership Academy

The Eagle Institute has been an excellent learning experience for the past several years, but there is a need to do more in the area of leadership development. It is recommended that an ASBO International Leadership Academy be created to meet these needs. Potentially, the academy could be offered over a one to two year period with sessions presented throughout the year. Some of the academy curriculum could be developed on-line or using distance learning. The outcome of the Leadership Academy training should be the development of leaders who represent the profession in a most professional manner.

3. ASBO International committee chair training

The ASBO International committee chairs are the leaders of many members who work diligently for the Association. It is recommended that ASBO International review the possibility of paying for committee chairs to attend national meetings that are in direct relationship with their committee duties. This professional development activity would pay great dividends to ASBO International as future programs are developed. This would enhance the leadership knowledge and skills of the committee chairs. There should be strict guidelines on these opportunities including an evaluation/accountability element regarding attendance at these meetings

H. Member Business Service Center

1. Create a member business service center

In order to recruit and retain members, ASBO International must continue to create new services. The creation of a member business service center would provide an opportunity to provide several services.

Potential new services would include the following:

- ◆ *A clearinghouse of school business management data and a resource center to distribute information to the membership*
- ◆ *A placement service to assist members as they seek new employment*
- ◆ *A school business office peer review process that can function in any affiliate*
- ◆ *A professional development training program for support staff*
- ◆ *Other services should be added that are deemed important by the membership*

I. Unified Dues

1. **Investigate the implementation of unified dues that would create memberships in an affiliate and ASBO International simultaneously**

At one time in its history, ASBO International had a system of unified dues with their affiliates. Unified dues are different from two dues and one invoice that ASBO International created a few years ago. Unified dues collection is a system where the affiliate and ASBO International dues are paid at the same time and are determined mutually. In this system, if you join an affiliate, you automatically join ASBO International. Under the two dues and one invoice program, the affiliate dues are determined by the affiliate and a member is not required to be a member of ASBO International. With unified dues, ASBO International has more control of the dues amount and schedule. Further, this has the potential to substantially increase the number of ASBO International members and membership revenue.

This would be a major undertaking and dramatic change, but the concept should be investigated to determine the advantages and disadvantages for ASBO International and its affiliates.

J. Explore Strategic Partnerships with Other Professional Associations/Organizations

1. ASBO International should review the potential of merging with other school business management associations

There are several national and international associations that are involved with school business management issues. These associations represent school employees who deal specifically with transportation, school nutrition, human resources, facility management, risk management, etc. ASBO International should develop a strategy to work closer with these associations with the potential in the future to have these associations merge with ASBO International. The ultimate potential is for ASBO International to be the umbrella over several groups that have school business management programs. An umbrella group would have greater clout on legislation with their united front. Further, the strength of a combined membership would create a system for additional services to all members.

K. Sustainability/Revenue Generation

1. Create a revenue generation strategy to sustain new programs and future endeavors

The recommendations found in this report will require additional staff and resources to implement. It is the ASBO International Board of Director's decision on whether any of these recommendations are deemed appropriate to implement. This recommendation is critical to the implementation of any new programs and for ASBO International to progress into the future. ASBO International must have a strategy regarding revenue streams to sustain new programs and to guarantee implementation of future endeavors.

Potential avenues for revenue generation are as follows:

- ◆ *Enhance Annual Meeting revenues*
- ◆ *Create new programs such as the University of ASBO International concept, member business service center, Legislative Conference, Leadership Academy, etc. that will provide new revenue to the Association*
- ◆ *Expand state, provincial and international membership to generate more revenue, which would include the multiple tiers of membership concept*
- ◆ *Increase professional development opportunities, including partnering more with affiliates and other associations*
- ◆ *Continue to pursue non-dues revenues*
- ◆ *Continue to pursue additional sponsorships*

L. Continue Review of the Future

1. ASBO International must continue to look into the future to assure success

The 2005 Future's Task Force will disband after the 2006 ASBO International Leadership Conference. The task force was created to make recommendations regarding where ASBO International should be in the next 5 to 10 years. The task force had a defined time to create its stated purpose. It is recommended that ASBO International create a strategy to continue the review of its future. This report is the beginning, but to be successful in the future, ASBO International must keep an eye on the horizon. Whether it is a creation of a permanent task force, a new future's committee, or a group that meets every two years, ASBO International needs to use this report as a stepping stone to a continuous review of member needs and services.