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A Letter From the President and CEO & Executive Director

July 26, 2019

Welcome to the newest edition of our resource manual for CASBO professional councils! Our goal is to create a resource that will provide professional council (PC) leaders with information and materials to assist in the operation of your PC and understand the role and activities of all PCs. The resource manual is designed to be a leadership tool and information source, and to provide samples and templates to assist you in your efforts.

Annually, this document will be expanded and updated to include more materials and resources. The document will be available to all CASBO members online in an electronic format.

We wish to thank the many member leaders and staff who helped us create this publication. We welcome your recommendations for changes or additions as well as current samples of documents that you would like to share. Please email your recommendations and materials for future inclusion to Michelle Neto at mneto@casbo.org.

Professional councils are an important part of our history, tradition and future. Vibrant professional councils allow our members to share their expertise and knowledge by networking, producing programs and workshops at the section and state level, and by developing publications that highlight business best practices and pertinent information. They will also assist us in advancing our legislative agenda and platform by utilizing the expertise of our members.

If you are currently active in a professional council, thank you! Your leadership makes a difference in our industry and benefits the children of California. If you are not actively involved, we say: WHY NOT? Your profession needs you! This year, CASBO will introduce new mentorship opportunities. Please stay tuned for more information and become a mentor!

With great respect,

Molly Schlange        Molly McGee Hewitt, CAE
CASBO President        CASBO CEO & Executive Director
Our History

Founded in 1928, CASBO is a private, nonprofit corporation and is the oldest statewide school administrator’s organization in California. Association members are the voice of the industry and oversee all areas of school business management and operations, including accounting, charter schools, chief business officials, child nutrition, facilities, financial services, human resources, maintenance & operations, payroll, purchasing, risk management, special education, technology and transportation.

Our Mission

The mission of CASBO, the member-driven, recognized authority and leading voice in California school business, is to promote best practices and ethical values; develop effective leaders; provide advocacy; support the diverse needs of our members; and set the standard for excellence through ongoing, quality professional development, mentorship, timely and relevant communication, dynamic collaboration, and cutting-edge innovation.

Through the teamwork of dedicated volunteers and our staff, we create a strong organizational foundation that makes it possible to reach our goals.

Mission Statement

The mission of CASBO, the trusted authority on school business operations, is to support the success of all students through leadership, innovative professional development and advocacy.

Vision Statement

CASBO: The foremost authority on school business.

Belief Statements

We Believe …

Public education is essential to a free and informed society.
Equity is a core value.
Public trust requires personal and professional accountability, responsibility and transparency.
We foster leaders who model integrity, transparency, respect and accountability.
Our diverse membership contributes to the overall success of the organization.
Ongoing professional development is essential to personal success and organizational excellence.
Mentoring develops leaders, promotes growth and builds success.
We excel at providing expertise on issues relating to school business, which is an essential component for public school financial strength and student achievement.
Through political action we can influence policy for the benefit of public education.
Strategic partnerships build success.
Creativity and innovation are vital to remain relevant.
If we are successful, all students win.
Parameters

We will promote the best interests of students in business decisions.
Our members will always be the priority.
We will embrace and promote ethical standards.
We will solicit, embrace and promote all forms of diversity and inclusion.
We will cultivate an environment that builds trust for all members to feel valued and grow.
We agree that all programs, practices, budgets and decisions must be aligned to our mission.
We will strive for excellence under all conditions.

Objectives

To develop world-class leaders through professional development, certifications and mentorship opportunities.
To ensure communication and collaboration with partners to demonstrate our commitment to the success of all students.
To be the recognized leader and preeminent advocate for school business operations.
To strengthen our brand position.

Strategies

Professional Development
We will engage in professional development grounded in adult learning theory that incorporates just-in-time learning, active participation tailored to member needs and multiple modalities.

Marketing
We will develop and execute a comprehensive and cohesive marketing plan.

Advocacy
We will advocate for a full range of school business operations through outreach; education; and a network of members, stakeholders and policymakers.

Leadership
We will create a consistent road map to develop exceptional, diverse leaders throughout CASBO.

Communication
We will provide timely, relevant and engaging information through multiple communication approaches to meet the diverse needs of our membership and strengthen our presence in the education community.

Our Code of Ethics

CASBO maintains standards to guide our membership and ensure the reputation of our organization is maintained and enhanced at all times.

CASBO believes in the worth and dignity of all members and accepts the responsibility to embody the highest professional and ethical standards. CASBO recognizes the importance of integrity, devotion to excellence and equal participation opportunities for all members of the organization.
CASBO’s code of ethics is a set of ideals to clarify organizational standards, and members are expected to honor and follow normal professional standards of conduct in all areas of CASBO activities to ensure that the organization serves the needs of California public education. Members are to act as trustees of the organization and to promote goodwill for all those associated with the organization. Honesty and integrity will be the guiding force of all members.

As part of their commitment to the school business profession and to the CASBO organization, members will practice the following guiding principles:

- Members shall serve the association as a whole, putting the needs of the entire membership first.
- Members shall act in a professional manner in all activities with all members at all times.
- Members will provide for and encourage participation in all CASBO activities and programs without discrimination or harassment, providing equitable treatment for all members.
- Members shall not misrepresent their own professional qualifications.
- Members shall not tolerate other members acting in an unethical manner and shall work with CASBO leadership to correct these actions.
- To ensure continuity for the association and its members, all activities shall be in accordance with the CASBO Bylaws and Manual of Procedures (MOP; casbo.org > About > MOP).
- Members have an obligation to support the profession and association and to not misrepresent CASBO in public discussion.
- In the course of volunteer activities, members may have access to confidential information. All information is to remain confidential and shall be disseminated in accordance with the CASBO Bylaws and MOP.
- Members shall uphold all state and federal laws, as well as their individual local education agency (LEA) policies and procedures.
- Members shall strive for excellence and innovation to enhance the association for current and future members.
- Members shall network and support other members sharing best business practices to ensure the success and growth of all members.

CASBO’s code of ethics is intended to provide a framework for ethical decision-making, as no policy can provide specific guidance for all situations. It does not embody the totality of CASBO’s ethical standards, nor does it answer every ethical question or issue that might arise. It is one element of a broader effort to create and maintain a quality association that gives ethical conduct the highest priority while cultivating a culture of accountability and transparency.

**Our Professional Standards**

CASBO recognizes its vital role in supporting the education of students as well as supporting the instructional program and student achievement. CASBO further recognizes that our members are both mentors and evolving leaders in their individual fields of school business and, as such, are essential to the success of education.

As leaders, the need for high standards and professional business practices is crucial for all aspects of school operations. The action of the school business professional directly affects school districts, county offices of education, charter schools and other education organizations, as well as the local community, parents and students.
With our role as stewards of public resources comes a demand for accountability, transparency and integrity. A formal set of professional standards is required now more than ever. These guiding principles are a framework to support the evolving role of school business professionals and form the foundation of daily decision-making.

It is the goal of CASBO to delineate guiding principles to assist our members in understanding their individual roles, provide tenets for daily practice that produce positive results, and ensure that school business officials understand and demonstrate their abilities to:

**Leadership and Professionalism**
- Execute and implement professional obligations and responsibilities with integrity.
- Refuse to use the position for gratification, preferential treatment or personal gain.
- Pursue appropriate measures to correct failures of others to act in an ethical manner.
- Engage in the improvement and growth of the profession through active participation in professional associations, dissemination of professional knowledge and mentoring.
- Understand the role of a leader and apply various models of organizational leadership as appropriate.
- Confront the status quo when evidence exists that change is needed for the health and well-being of the association.

**Management, Operations and Organization**
- Implement and maintain quality business practices through teambuilding, conflict resolution, motivation and encouragement.
- Develop and accomplish specific goals and objectives as required and essential to the ongoing operations of the association.
- Understand and use inherent strengths of personnel to maximize results.
- Recognize both existing and potential problems and mitigate concerns by securing adequate and pertinent information to assuage concerns and conflict.
- Accurately disseminate and communicate to stakeholders complex sets of data and critical information in articulate and easily understandable formats.

**Safety and Well-Being**
- Support the principles of due process to protect both the civil and human rights of all individuals.
- Prioritize decision-making in consideration of the well-being of students, staff and stakeholders.
- Promote safe and productive learning environments with respect to facilities, personnel and educational programs.

**Policy, Regulations, and Advocacy**
- Practice within the professional ethics, standards and policies of the association.
- Execute, implement and uphold national, state and local laws, codes, regulations and policies.
- Advocate for change where inconsistencies in professional ethics, standards, policies, laws, codes and regulations exist.
- Identify the role of school/community/special interest groups and their influence on policymakers.
- Advocate for professional conditions and resources that will improve learning environment, outcomes and delivery of educational programs.
Our Professional Councils

CASBO’s professional councils (PCs; casbo.org > About > Committees & PCs) are a reliable resource offering business best practices for the 15 disciplines in school business operations. They are delegated to advocate what is best for the LEAs that they represent with other industries. The PCs are listed below and linked to their rosters posted on the CASBO website.

- Accounting
- Charter Schools
- Chief Business Officials
- Child Nutrition
- Facilities
- Finance
- Human Resources
- Maintenance & Operations
- Payroll
- Purchasing
- Retiree
- Risk Management
- Special Education
- Technology
- Transportation

Purpose of the Professional Councils

CASBO’s PCs have been established to serve as resources in the development of business best practices, gathering and disseminating resources and information to members, ensuring quality Annual Conference sessions, participating in advocacy efforts, and encouraging membership and peer participation. In addition, each PC is encouraged to explore new and different ways to serve members within the context of our current member-driven strategic plan, CASBO by Design 2.0 (adopted October 2017; casbo.org > About > CASBO by Design 2.0), and with the approval of our Board of Directors.

Inside the Professional Councils

Each PC has a chair, assistant chair and immediate past chair, and each of those positions serves a one-year term. At the end of one year’s service as assistant chair, that individual becomes chair for one year. A new assistant chair is then appointed to serve for a one-year term. At the end of one year’s service as chair, that individual becomes immediate past chair for one year. (Associate members may not serve as PC chairs or assistant chairs.)

Membership of the PC is comprised of one representative from each of CASBO’s seven regional sections (casbo.org > Sections > Section Overview). Each section representative is appointed for a three-year term on the PC and also serves as chair of his or her regional section’s corresponding PC. (Associate members may serve as PC members for a period of one year, but only by appointment of CASBO’s president.)

Chair Succession

If a chair position becomes vacant prior to the end of the one-year term, the position is filled by the assistant chair. The assistant chair who becomes chair under these circumstances holds the chair position for the remainder of the vacating chair’s term, as well as for the full term for which the assistant chair was appointed.

If an assistant chair position becomes vacant prior to the end of the one-year term, CASBO’s president, in collaboration with that PC’s chair and the assistant chair’s section president, immediately appoints a replacement assistant chair. When the assistant chair position becomes vacan...
vacant due to that individual’s taking the chair position as described in the previous paragraph, the individual who becomes assistant chair holds the assistant chair position for the remainder of the vacating assistant chair’s term, as well as for one additional year. When the assistant chair position becomes vacant due to that individual’s resignation or removal, the individual who becomes assistant chair holds the assistant chair position for the remainder of the vacating assistant chair’s term and is then elevated to the chair position in normal succession and thereafter serves as chair for one year.

If a section representative position becomes vacant prior to the end of the section representative’s term, CASBO’s president works with that section representative’s section president to appoint a replacement to complete the term.

Each PC may invite guests to participate in PC meetings (e.g., California Department of Education employees); however, CASBO will not reimburse travel costs for associate members, guests, adjunct participants or ex-officio members.

**Professional Council Job Descriptions**

**Professional Council Chair**

The PC chair is responsible for maintaining an active, functioning PC. The chair is also responsible for meeting goals and timelines established by the Board of Directors and Annual Conference Committee (ACC; casbo.org > About > Committees & PCs). Specific responsibilities include:

1. Providing leadership and directing PC activities, including scheduling and chairing PC meetings.

2. Conforming all PC activities to CASBO policies and practices and conforming all expenditures to the PC’s budget as set by the Board of Directors (PCs do not develop their own budgets; each PC chair is allotted $5,000 per year by CASBO’s CEO/executive director).

3. Reviewing, signing and forwarding to CASBO for payment all reimbursement claims for member attendance at PC meetings, in accordance with the policies established by the Board of Directors.

4. Assigning and coordinating any regional section’s corresponding PC activities, prioritizing projects, and establishing timelines and assignments by section interests, resources and size.

5. Collaborating with the ACC, including:
   a. Attending ACC meetings and/or conference calls (scheduled by the ACC chair and CASBO’s CEO/executive director), to be held two to four times per year, usually at a site geographically located near that year’s Annual Conference site.
   b. Acting as a liaison between the PC and the ACC.
   c. Proposing and coordinating sessions developed by the PC for the Annual Conference program.
   d. Entering specific workshop descriptions and related information into the Annual Conference workshop database (CASBO staff, however, sends the letters to all PC-designated workshop speakers confirming date, time, place, presider name, contact information, workshop materials, etc.).
   e. Reporting on ACC activities to the rest of the PC.
f. Reporting on the PC’s activities to the ACC (discussion at ACC meetings is mainly about Annual Conference, and attendees give verbal, not written, reports).

g. Coordinating and participating in the PC’s presentations at Annual Conference, ensuring that all Annual Conference submission deadlines are met.

h. Providing written reports to the Board of Directors (the ACC chair reports on behalf of all PC chairs, using information provided by the PC chairs at ACC meetings).

i. Cooperating with any regional section’s corresponding PC in the development of section workshops and special programs.

j. Responding to CASBO’s request for the PC’s roster and meeting schedule (on a form to be provided by CASBO) and submitting it to the ACC chair prior to the first ACC meeting.

6. Using the services of and exchanging information and advice with the Legislative Committee (casbo.org > About > Committees & PCs).

7. Supporting the goals and objectives of CASBO as defined in CASBO by Design 2.0.

8. Placing a major emphasis on intra-council communications by sharing copies of the PC chair’s official correspondence with council members, Board of Directors liaison, the ACC chair and CASBO’s CEO/executive director; and by concurrently sharing any PC meeting minutes to the same parties.

9. Submitting the PC’s roster and master calendar for the year to the Board of Directors at least thirty (30) days prior to its June board meeting.

10. Annually signing CASBO’s conflict of interest policy (contained in the MOP).

11. Meeting with the incoming PC chair prior to Annual Conference to discuss the next year’s activities and to provide the incoming chair with:

   a. All official minutes of previous PC meetings.
   b. All official PC correspondence.
   c. All data necessary for the continuation of incomplete projects which are to be carried over.
   d. Other PC records, including its working file; copies of all meeting minutes where PC presentations were made or discussed; Annual Conference planning material; and prior PC budget requests, allocations and expenditures.

12. Contacting CASBO prior to Annual Conference to determine the names of individuals being submitted to the Board of Directors for consideration in filling vacant professional council positions and contacting those candidates to ensure that they attend the PC meeting to be held at Annual Conference, if appropriate.

Professional Council Assistant Chair

The PC assistant chair must support the goals and objectives of CASBO as defined in CASBO by Design 2.0. Specific duties include:

1. Attend all state PC meetings/participate in all conference calls.

2. Take the minutes of all state PC meetings/conference calls, beginning with the meeting held at Annual Conference. Minutes are reviewed by the chair and past chair and then sent out to the PC members (plus CASBO’s CEO/executive director and/or the ACC chair, as requested by the PC chair) as a “summary.” This summary should be
immediately distributed and is officially approved as minutes at the next subsequent PC meeting. Appended to this resource manual are examples of PC meeting summaries.

3. Prior to each of the state PC meetings, prepare a written report summarizing the assistant chair’s activities (e.g., emails sent, meetings attended, contacts/meetings with and feedback from members, issues to be dealt with) and bring copies of the report to the meeting.

4. Prior to the state PC meetings, send a reminder email to the section representatives about bringing copies of a written status report to the next meeting. If section representatives cannot attend the meeting, they should email copies of their reports to the assistant chair prior to the meeting.

5. Participate in developing workshop sessions for Annual Conference (e.g., suggest topics, obtain speakers and preside over conference sessions).

6. Assist the PC chair, as requested (e.g., schedule conference calls, identify potential PC members, represent the PC chair at meetings, help plan conference sessions, send speaker confirmation letters).

7. Upon the appointment of a new PC section representative, send a letter to the section president informing him/her that this individual will now be sitting on that section’s board of directors as the section PC chair. A letter should be sent in April of each year, immediately following Annual Conference (or at any other time of the year, as necessary).

8. Assist all section representatives, as requested. Help new section representatives with transitioning into their new roles.

**Professional Council Section Representatives**

Specific responsibilities of the PC section representative include:

**At the Section Level**

1. Serving as the chair of your section’s corresponding PC.

2. Contacting your section president to ensure that he or she has received the letter announcing your appointment to the state PC and ensuring that your name is added to section email distribution lists.

3. Developing an email distribution list of all potential members in your section, contacting and/or recruiting them to serve on your section’s corresponding PC, and soliciting feedback on how they view their roles in CASBO.

4. Attending all of your section’s board of directors meetings and providing your section board with a written report of your activities.

5. Sending three to four emails during the year to your section members, updating them on the state PC’s activities (via meeting summaries, minutes, etc.), and notifying them of upcoming state and section activities (such as workshops, section mixers, Annual Conference, PC meetings, etc.).

6. If your section holds job-alike workshops, working with your section board to coordinate and fund attendee registration and inviting section members and potential members to attend.

**At the State Level**

1. Attending and participating in all state PC meetings and/or conference calls.

2. Participating in Annual Conference workshop development by suggesting topics, obtaining speakers, serving as a workshop presider, etc.
3. Prior to each state PC meeting, preparing a written report summarizing your activities (e.g., emails sent, meetings attended, contact with and feedback from section members, issues to address, etc.).

4. Bringing copies of your written report (and other relevant materials) to each state PC meeting and also providing a verbal report; or if you cannot attend the meeting, emailing your report to the state PC assistant chair prior to the meeting.

5. Contributing to discussions, decisions and plans; asking questions; and responding promptly to all requests from the state PC chair and/or assistant chair for feedback, information and/or action.

6. Submitting Travel Expense Claim Forms for attendance at state PC meetings to the state PC chair within two weeks of attendance. *(Reimbursement claims submitted more than sixty (60) days after the meeting will not be paid.)*

**Professional Council Appointments**

**Professional Council Assistant Chair**

Incoming CASBO officers are responsible for appointing PC assistant chairs no later than 30 days prior to Annual Conference. Every consideration is given to finding and developing suitable candidates to serve in PC leadership. PC assistant chair appointee names are presented to the Board of Directors for ratification no later than the June board meeting.

In appointing the PC assistant chair, consideration will be given to interest, tenure on a state PC, demonstrated communication skills and technical abilities, leadership and organizational qualities, and participation in CASBO activities and distribution of leadership opportunities at both the state and section levels. In addition, individuals who are appointed as a PC assistant chair must be a current or former member of that PC for at least one year prior to assuming the assistant chair position.

**Professional Council Section Representative**

Individuals may apply for appointment to specific PCs via the CASBO appointments process. Candidates interested in serving as a section representative shall be members in good standing for at least one year at the time of the appointment. Appended to this resource manual is an example of an annual solicitation for applications for leadership appointments.

**Professional Council Legislative Activities**

The strength of CASBO’s advocacy program is the expertise of CASBO members. Accessing that knowledge to influence legislation is a primary responsibility of each PC. Individual PC member responses to inquiries from CASBO staff (casbo.org > About > Staff) as well as the professional network of each PC member is critical to CASBO’s success in the legislative arena.

**Initiation of Legislation**

PCs are strongly encouraged to recommend legislative proposals and platform statements to the Legislative Committee.

**Evaluation of Legislation Proposed by Others**

The Legislative Committee or CASBO staff may refer legislative proposals to a PC for review and input. PC members are encouraged to participate in CASBO’s legislative program by
submitting proposals and responding promptly to inquiries from the Legislative Committee or CASBO staff. PC members are encouraged to forward requests to their section colleagues for broader input on important issues.

Advocacy

CASBO provides our members with effective advocacy support by educating elected officials and policymakers about issues affecting public education finance, labor law changes, and student success. CASBO has established both a Federal Advocacy Platform and a State Advocacy Platform to provide basic parameters that help guide CASBO’s Legislative Committee and Board of Directors on matters pending before the U.S. Congress, California Legislature, and our federal and state governments. The platforms and principles are consistent with CASBO’s mission, strategic planning process, and initiatives and are appended to this resource manual.

We encourage our members to support our advocacy efforts by taking action with our e-advocacy tools that allow them to contact their elected officials (casbo.org > Advocacy > Governmental Relations > Write Your Legislator) track votes and stay informed on important issues of the day. Members can also learn more by reading CASBO’s policy positions (casbo.org > Advocacy > Governmental Relations > Policy Action Center) and by engaging with our CASBO Advocacy Network (casbo.org > Advocacy > Governmental Relations > CASBO Advocacy Network).

Periodically, the Legislative Committee or CASBO staff may contact PC members requesting specific action on an issue, such as calling legislators or the governor to express support of or opposition to an issue. PC members are encouraged to act on these requests in a timely manner and forward them to their section colleagues for broader response.

PC members should remember that the official CASBO position on any legislation is determined by the Legislative Committee and the Education Advocacy Foundation Board of Trustees (EAF; casbo.org > About > CASBO Leadership). In cases of urgent need for establishing a CASBO position, the PC chair should contact CASBO staff or the Legislative Committee chair directly.

It is imperative that no CASBO member communicates to a legislative representative a legislative position in CASBO’s name unless that legislative position has been approved by the Legislative Committee or the EAF.

Professional Council Reports to the Board of Directors

The Board of Directors meets four times a year: in June, October or November, January and April. At each of these meetings, the board requests a written report from our state directors, PCs, select standing committees (Professional Standards & Leadership Committee, Continuing Education & Certification Committee, Legislative Committee), and other groups as requested.

At the beginning of each fiscal year, CASBO will provide PC chairs with the following timelines for submitting PC reports. CASBO provides an advance agenda to board meeting attendees which includes PC reports which are submitted on time (reports not submitted on time are hand-delivered to the board meeting attendees). The current year timeline is appended to this resource manual for your reference.

The goal of the PC report should be to inform and enlighten the board on the PC’s progress and actions and provide feedback that allows the board to make informed decisions. Please set forth
a factual representation of what has occurred since its last board report, including, but not limited to: meetings held, professional development activities planned and executed, calendar information for upcoming meetings and events, budget updates, implications for CASBO by Design 2.0, successes and challenges, and any request for information or assistance.

Reports are normally one page in length and should include the PC’s name, the name of the person who prepared the report and the date the report is presented. CASBO publication standards request that the report be single-spaced in Arial 11-point font and include the use of our logo. Appended to this resource manual is an example of a PC report prepared for a board meeting.

Establishing a New Professional Council

PCs are established for the purpose of serving as a resource in developing business best practices, gathering and disseminating resources and information to our members, ensuring quality Annual Conference sessions in the PC’s discipline, participating as a resource in advocacy efforts, and encouraging membership and participation in CASBO. PCs are encouraged to explore new and different ways to serve our members within the context of CASBO by Design 2.0 and with the approval of the Board of Directors.

Proposing a New Professional Council

Proposal Submission Process

The process of forming a new PC begins with the submission of a formal proposal to CASBO’s CEO/executive director. Below is a checklist to be used when preparing a proposal:

<table>
<thead>
<tr>
<th>New PC Proposal Content/Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Submitter Information</strong></td>
</tr>
<tr>
<td>✓ Name of submitter</td>
</tr>
<tr>
<td>✓ CASBO member number</td>
</tr>
<tr>
<td>✓ Submitter employer information</td>
</tr>
<tr>
<td>✓ Contact information (phone and email)</td>
</tr>
<tr>
<td>✓ Submitter Bio (including any previous CASBO activities)</td>
</tr>
<tr>
<td><strong>Cover Letter</strong></td>
</tr>
<tr>
<td>✓ New PC name</td>
</tr>
<tr>
<td>✓ Explanation of how the proposed PC fits within the mission, vision and strategic plan of CASBO</td>
</tr>
<tr>
<td>✓ Evidence that there is a core group of CASBO members to represent an active and fully functional unitary interest</td>
</tr>
<tr>
<td>✓ Explanation of need/rationale for the new PC, including:</td>
</tr>
<tr>
<td>• A statement of goals and objectives of the proposed PC with a plan of action of how the goals and objectives will be met</td>
</tr>
<tr>
<td>• A statement outlining the themes and topics that the proposed PC will address and expected outcomes (i.e., scholarly research or white paper)</td>
</tr>
</tbody>
</table>
**Proposal Approval Criteria**

Approval for establishment of a new PC may be given, provided that:

- The PC represents an active and unitary interest of a group of CASBO members.
- The proposed objectives of the PC are aligned with the goals and strategic direction of the association.
- The proposed PC represents a distinct and unique topic/area of interest that is unable to find a place in an already established PC or committee.
- The PC represents an established and reasonably extensive area of professional interest within education as whole.
- The PC is financially sustainable.

**Proposal Review Process**

Upon submission, CASBO’s CEO/executive director reviews it and makes a recommendation to the Board of Directors. The board, along with the CEO/executive director, reviews and determines if the proposal satisfies all requirements for the submission process. At its next meeting or conference call, the board presents the proposal, provides feedback and requests follow-up information, if necessary.
After review and discussion of the proposal, the board determines if it should be accepted. If accepted, the board forwards the proposal to the Executive Committee with a recommendation for establishment.

If approved by the Executive Committee, the new PC will begin operation immediately after notification from CASBO’s CEO/executive director. If the Executive Committee recommendation is unfavorable, the submitter may choose to take an additional year to modify the proposal while ensuring that the original intent is retained.

**Forming a New Professional Council**

New PCs begin operations immediately upon notification by the Board of Directors. The PC is on probationary status for two years following approval and is then evaluated by the board. Each PC is assigned a liaison from the board to serve as a resource.

**Plan for Meeting Minimal Criteria and Maintaining a Professional Council**

- Plan and conduct at least one workshop at Annual Conference.
- Work to support CASBO by Design 2.0 and other programs, as appropriate.
- Establish effective communication with members.
- Submit an annual report of activities according to MOP requirements.

**Organizational Structure**

The organizational structure of a PC normally consists of a chair, assistant chair, immediate past chair and one member from each section. It may also include an associate member as a non-voting member.

**Professional Council Budget**

Each PC budget is set by the Board of Directors, and all PC expenditures and activities must conform to CASBO policies and practices.

**Professional Council Expenditures**

Each PC chair is responsible for approving the bills of PC members and forwarding them to the CASBO office for payment. All PC members must be current CASBO members with paid dues; reimbursements will be withheld for non-members.

Approved expenditures are limited to travel to PC meetings, education materials and PC logo wear (unless specifically authorized by the Executive Committee).

**Governance Meeting Expense Reimbursement**

All members as defined in the CASBO Bylaws (except associate members, who must provide for their own transportation, accommodations, meals and other expenses as necessary when they participate in association activities) are eligible for approved expense reimbursement when attending governance meetings at the state and section levels (e.g., board or executive committee meetings, standing or operational committee meetings, PC meetings, task force meetings, etc.), when requested and authorized to attend, except when the meeting is scheduled during Annual Conference.
**Processing Expense Claims**

Claims must be approved and signed by an authorized governance group chair or officer (see approval of claims below) and must include itemized receipts for all expenses other than private auto mileage and porterage tips. Summary receipts will not be reimbursed. Expenses claimed without authorized approval or receipts may be denied.

**Allowable Expenses**

The following expenses are reimbursable, when necessary:

1. **Lodging.** The cost of overnight hotel accommodations (including room and tax only) is reimbursable only if the governance meeting is more than one day or if the meeting location reasonably necessitates an individual’s overnight stay. Requests by individuals for overnight stays in conjunction with established meetings must be approved in advance by CASBO’s CEO/executive director.

2. **Transportation.** Ground transportation (private vehicle, taxi/shuttle, car rental, etc., plus tips) and/or air transportation will be reimbursed at the lesser amount of either:
   a. the cost of private auto travel at the current standard IRS mileage rate; or
   b. the current cost of round-trip, coach airfare via commercial airlines plus ground transportation to and from airport. (When flying Southwest, *Anytime* or *Wanna Get Away* fares are acceptable. Business select fares are not reimbursed.)

3. **Meals.** Actual and necessary costs not to exceed the current standard IRS meal allowance guidelines.

4. **Miscellaneous.** Parking, porterage tipping, bridge tolls, telephone, printing and other similar reasonable expenses are reimbursable at actual cost.

**Non-Reimbursable Expenses**

The following expenses will not be reimbursed by CASBO:

- Recreational expenses (movies, sporting events) or day-use health club fees.
- Alcoholic beverages, including bar tabs, hotel room mini-bars, airline drinks or other alcoholic beverages.
- Other personal expenses not related to CASBO business.
- Expenses not appearing on itemized receipts.

*NOTE: Alcoholic beverages, including bar tabs, hotel room mini-bars, airline drinks or other alcoholic beverages are not reimbursable expenses.*

**Timeliness of Claims**

A **Travel Expense Claim Form** (casbo.org > Resources > Forms and Applications) must be completed, approved and submitted to the state office within 60 days from the time of the expense to be reimbursed.

**Acceptable and Reimbursable Expenses**

The following expenses are reimbursable by CASBO when CASBO members are traveling on approved CASBO business:

- Meals at actual and necessary costs not to exceed the current standard IRS meal allowance guidelines.
- Business meals in surroundings conducive to business discussions and related directly to CASBO activities and business.
• Commercial air travel with every effort being made to take advantage of discounts and special offers.
• Ground transportation should be as economical as possible, with consideration being given to using airport and hotel shuttles before using taxis or renting cars.
• Mileage, parking and tolls when appropriate. Mileage will be reimbursed at the current IRS mileage rate. When driving long distances, it becomes more economical for the association to reimburse for car rental and actual fuel expenses rather than to reimburse for mileage when using a personal vehicle.
• A maximum of three calls per day to home or office in non-emergency situations and in-room internet charges. Total reimbursement not to exceed $20 per day.
• Gratuities of $3 per bag and 15% for taxis.

Approval of Claims
• Claims from governance group members must be approved by the group’s chair.
• Claims from governance group chairs must be approved by the CASBO’s CEO/executive director.
• Claims from board members must be approved by CASBO’s CEO/executive director.
• Claims from CASBO staff must be approved by their supervisor.

Alcohol at Events
No alcohol will be paid for by CASBO at any meal function (state, section, committee or PC) or other event except those that are sponsored.

Special Appointments
Generally, CASBO will not reimburse for travel expenses for CASBO members who are representing the association at non-CASBO events or meetings unless the event, committee or task force is of special interest or importance to the mission of the association. When expenses are to be covered, those expenses shall be included in the CASBO budget under the appropriate item.

Creating Dynamic and Effective Programs
CASBO has a tradition of using its own members to conduct research, study issues and report findings to members through the vehicle of professional development training events.

The following is intended to provide PC members with information prepared for section leadership to help them gain new ideas and resources for creating professional development programs. Please review this information so that you are prepared to work with section leaders to create dynamic and effective programs.

Sections offer programs in a variety of formats. They can be intense half- or whole-day workshops on specific topics, lunch-and-learn programs, job-alikes, or professional development days with a variety of workshops and general sessions. The opportunities and options are endless! Section-sponsored professional development activities are essential to our members.
While the use of outside experts is welcomed, one of the foundations of CASBO has been and will continue to be using the expertise of our member leaders directly. Being a presenter is a great way to gain experience in public speaking and to gain visibility as a subject matter expert or industry leader. We encourage sections to use local resources whenever possible!

Please remember, that in order for professional development to be effective, we must:

- Continually improve our programs and presentations.
- Provide assistance to our members by providing exceptional educational opportunities.
- Explore new methods of delivery and use a variety of delivery options.
- Experiment and try new ideas!

Please note that to ensure a good audience for your programs, you need to begin workshop setup and promotions at least six weeks in advance of your event! The sooner you begin, the better! An annual calendar will assist in creating a quality program with maximum participation.

**Program Ideas**

- Involve your entire board and PC chairs in the development of your programs.
- Evaluate previous programs, speakers and venues. Learn what your section members like and don’t like in programs!
- Use the CASBO website, newsletter and email blasts to promote the event.
- CASBO can do online registration for you.
- Send flyers to school districts, members, PCs and past attendees. Use members to distribute the flyers or access COE services to help.
- Use social media: Twitter, Facebook, Instagram.
- Update your section or webpage to increase traffic!
- Invite surrounding sections to participate with you.
- Give incentives for registering early. Discounts and giveaways for a certain number of people are effective.
- Provide incentives to include more people to register as a group. Giving group discount rates allows for attendees to commit to attendance.
- Give away door prizes.
- Send a letter of invite or articles or other information from the speaker. Receiving official correspondences from the speaker lets attendees know who will be there.
- Get creative and think out of the box! There are other ways to transfer information, such as:
  - Centers,
  - TED Talks,
  - Panels of experts,
  - Point and counterpoint speakers, and
  - Multiple speakers/options.

**Planning Your Programs**

*Decide What to Talk About*

- Current news, trends and popular issues
- Hard and soft skills
- Need to know vs. nice to know
• Image
• Leadership
• Interpersonal Communication
• Certifications
• Health
  o Life balance
  o General wellness
• Communications and marketing
  o Social media
  o Public relations
  o Public speaking
  o Writing
  o New and updated office programs
• Management and supervision
  o Evaluation
  o Morale
  o Teambuilding
  o Employee orientation and training
  o Employee retention
  o Employee dismissal
• Technology
  o Apps and trends
  o Cyber security
  o Tablets
• Customer service
  o Phone skills
  o Serving our diverse public
• Education IQ
  o Understanding
    ▪ Special education
    ▪ Common Core
    ▪ Collective bargaining
• Diversity topics
• Generational differences
• Conflict resolution
• Emergency planning
• Succession planning
• Organizational development
• Humor in the workplace
• Time management
• Paper management

**Think About Your Audience**
• Who would benefit from this event?
• Does anyone else offer this program?
• Does it meet CASBO standards?
• Is it in a convenient location?
• Are there any online options?

**Types of Sessions**

**Session Styles**

<table>
<thead>
<tr>
<th>Type</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>SNAP Sessions</td>
<td>30 minutes</td>
</tr>
<tr>
<td>IGNITE Sessions</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Deep-Dive Sessions</td>
<td>2+ hours</td>
</tr>
<tr>
<td>Intensives</td>
<td>3-6 hours</td>
</tr>
<tr>
<td>Clinics</td>
<td>6-12 hours</td>
</tr>
<tr>
<td>Game Changers</td>
<td>1-2 hours</td>
</tr>
<tr>
<td>Workshops</td>
<td>45-60 minutes</td>
</tr>
</tbody>
</table>

**Job-Alike Programs**

Job-alike events are a great way to introduce new people to CASBO and bring members together. To be effective, the program must have structure. Here are some hints for a successful job-alike program:

• Select leaders who are organized and prepared well in advance.
• Have topics for discussion prepared ahead of time. Start the program off with a guided discussion of a topic pertinent in the discipline.
• Have shareable handouts or materials available.
• Facilitate the program. Leaders need to make sure that all participants can speak and have a chance to participate.
• Encourage questions and ask questions! Seek out other opinions and points of view.
• Make sure that the discussions stay at a professional level.
• Allow the group to introduce themselves at the start of the program. Some samples of questions to ask:
  o What’s your name and where do you work?
  o What is your title or position, and how long have you been in your current role?
  o What are your major responsibilities and greatest challenges?
  o What do you need to be more effective in your job?
  o What one piece of advice would you offer to people new to our profession?
  o What do you hope to learn today?
Speaker Criteria

As a professional association, CASBO uses a variety of speakers and presenters for conferences, workshops and other professional development activities. In order to maintain our high standards of excellence and quality of our programs, these criteria are expected to be used when selecting speakers and presenters.

Definition of a Speaker

A speaker is a person or group of persons who deliver(s) a specific message or instruction in a workshop or conference setting to an audience at a CASBO professional development event, including, but not limited to, subject matter experts, celebrities, professional speakers and dignitaries.

Paid speakers and invited keynote speakers for Annual Conference, CBO Symposium, School Business 360 (formerly known as CBO Boot Camp) and state workshops are vetted by CASBO staff with input from CASBO leadership.

Speakers for section events are vetted by the section’s board of directors.

Overriding Principles in Selecting a Speaker

- The speaker or presenter provides the best educational opportunity to your audience.
- The opportunity to address CASBO audiences is a privilege.
- Presentations shall not be a vehicle for directly advertising products or services.
- Speaker selection shall be based on:
  - Subject relevance,
  - Interest to our members,
  - Political acumen, and
  - Ability to engage an audience.

Priority of Speaker Selection (in order of preference)

- Qualified members (including associate members), then
- State department and Fiscal Crisis & Management Assistance Team officials.
- Other outside/non-member presenters should be considered:
  - Only after first considering those above, or
  - When a special kind of expertise, experience, presentation or delivery is not found among our cadre of regular and associate members.

Identifying Qualified Speakers

- Individuals charged with selecting the speaker(s) should make appropriate reference checks if they are not directly familiar with the speaker(s).
- The CASBO group sponsoring the event will self-monitor the quality of the speaker(s) and provide appropriate feedback (both positive and negative) to the speaker(s).

Where to Find Speakers

- CASBO staff
- CASBO officers
- AMC Speakers Bureau
- Associate members
- Annual Conference presenters
- County Offices of Education
- California Department of Education
- City or county agencies
- Emergency services
- Hospitals
• Universities & community colleges  
• Toastmasters  
• TV or radio stations  
• Newspaper columnists or editors  
• Elected officials  
• Key public officials (police chiefs, fire marshals, postmasters)  

**Program Guidelines**

- Price carefully! Remember that individual members and organizational subscriber employee members get a discount.
- Coordinate schedules! Make sure that you are not competing with other professional development programs.
- Select locations that are easy to find and have sufficient free parking.
- Carefully craft your programs. Watch your titles! Too cute can be a turn off. Design your programs for specific disciplines.
- Market the program and the speaker.
- Think about what the unique features of your program are and what benefits the program will provide to attendees and their employers.
- Think “Value Added.” What will be the value added to an attendee’s career and employer?

**People Want to Know**

- Who is this program designed for?
- Why should I attend?
- What will I learn?
- What will I leave with?
- What is the value to me? My employer?
- What is the time commitment required and cost?
- Where can I find directions and parking information?
- Who do I contact for more information?

**Find a Need and Fill It**

- Listen to your colleagues
- Ask them what they want
- Ask their supervisors what they need
- Find the best days and times of the week
- Full day, half day, lunch-and-learn?
- Webinar?

**Things to Avoid (Traps and Tunnels)**

- Topics and/or language that’s too cute
- Not enough information
- Repeated programs
- Use of copyrighted materials
• Poor PowerPoint presentations
• Sales pitches
• Poorly prepared speakers
• Outdated topics
• Repeatedly using the same speakers

**Evaluation**

Never forget to evaluate your event after it has concluded. Determine if you will use an electronic evaluation system (like Survey Monkey) or a paper evaluation. Evaluate the following (and then share your results with your presenters, being ready to make improvements if your score is less than 70%):

- Your program and speaker(s)
- The location of your session and the facility in which it was held
- The date and/or time of your session

Recruiting and Retaining Members and Volunteers

**Membership and Volunteer Principles**

- We want members who want to belong and participate.
- The new membership structure enacted in 2017 allows us to bring in more opportunities for member/volunteer participation.

**Why People Join**

- To advance their careers,
- To obtain information they need,
- To add value to their professional lives,
- To make personal connections,
- To obtain professional certifications, and/or
- To network and make new friends.

**What Sets CASBO Apart**

- We promote leadership at all levels.
- We bring all disciplines together and work with other disciplines to succeed.
- We provide training that promotes skill development, including that for professional certifications.
- Our advocacy efforts effectively support *all* LEAs, not just those who are subscribers.
- Membership is not dependent on working in a management position.
- Our philosophy is “business rules,” not instruction.

**How PCs Can Attract and Retain Through Micro-Volunteering**

- Create a master list of volunteer opportunities in your PC.
- Recruit with transparency — offer the opportunity to all members and specify needed expertise.
- Keep records of work — know who did what for recognition and future projects.
• When spots are filled, share other opportunities.
• Clearly identify skills needed and match skills to opportunities.

**Determining Jobs and Managing Expectations**

• Role name
• Time commitment
• Any pre-requisites
• Contact or staff people
• Meeting requirements
  o Number of meetings
  o Length of time
  o In person vs. virtual meetings

**Ideas for Volunteers**

• Usher or serve as a greeter;
• Collect tickets;
• Act as registrar;
• Write a review of a program, article or book;
• Write an article for newsletter;
• Judge for a project;
• Serve as a focus group member/leader;
• Create a program;
• Preside at a meeting;
• Host a pre-meeting program;
• Develop an Annual Conference workshop;
• Submit nominations for awards/roles; and/or
• Design a flyer, website ad or other item.

**How PCs Can Recruit/Retain Through Member and Volunteer Recognition**

Professional and personal recognition is important for career advancement in all educational disciplines. CASBO recognizes this and is endeavoring to create new opportunities to meet member needs and expectations.

Recognition comes in many forms! It may be as simple as a correctly spelled name on a badge, a welcome by name when attending an event, or a personal greeting. All human beings, CASBOdians as well, have a need to feel welcomed, wanted and valued.

Think about your programs and activities: Is there a way to enhance this personal recognition of your members, volunteers and guests? Personal recognition is also rooted in respect. Respect for expertise, for involvement, for support, for time and for participation. Great programs are an excellent way to show members and volunteers that they are respected and valued!

Professional recognition may be gained through listings on programs, speaking opportunities, publications, awards or public appreciation for service or effort. PCs are great vehicles to do this! Here are some ways you can recognize CASBO members and volunteers:
• Including names of presenters, committee members and volunteers in programs and materials distributed at events
• Creating a PowerPoint loop to be played before, during and after programs with names and pictures.
• Making sure your web page is updated with correct names, titles, and pictures.
• Presenting awards and recognition tokens (certificate, plaque or token of appreciation) is a lovely gesture that can be displayed in an office.
• Writing letters of appreciation to superintendents, boards and direct supervisors thanking them for supporting the individual and complimenting them on their achievement.
• Making introductions at events and publicly thanking people so that others know who they are and what they contributed.
• Sending notes or emails of thanks and support.
• Submitting articles for inclusion in CASBO publications.
• Encouraging new members and volunteers to participate by allowing them to introduce speakers or host an event, letting them share the spotlight and build leadership potential.
• Continually recognizing and thanking people to provide them with positive reinforcement.

Annual Awards
At the state level, CASBO has a well-defined and member-driven program for awards. Unfortunately, many times, awards remain unused due to a lack of nominations. Please visit our Awards web page (casbo.org > About > Awards) for nomination forms, and contact Gail Hills at ghillis@casbo.org if you need more information.

Smart Business Award
CASBO presents this award to an individual or organizational subscriber for innovative, creative and meaningful contributions to the improvement of the profession and the efficiency of school districts. Award criteria include:

• Outstanding practices and ideas that result in significant contributions to school entities or the profession of school business management
• Program or innovation developed and successfully implemented by California school business professional(s)
• Program or innovation with statewide effect, or potential effect, on the business practices of other school districts around the state

Commitment to Education Award
CASBO presents this award to a member in recognition of a lifetime of professional achievement in school business management that has improved public education and the lives of schoolchildren throughout California. Award criteria include:

• Nomination by someone other than the nominee
• Service that has had a statewide effect with a quality and scope of work that transcends local and regional boundaries, benefiting the entire CASBO membership
• Statewide reputation for service to school business management

Pinnacle Award
CASBO presents this award to a member who, through personal sacrifice for the benefit of the entire CASBO membership, has served in a leadership capacity and earned a statewide reputation for that service. As part of this recognition, the recipient is awarded with honorary lifetime membership benefits. Award criteria include:
• Nomination by someone other than the nominee
• Longtime service in a leadership capacity that has had a statewide effect with a quality and scope of work that transcends local and regional boundaries, benefiting the entire CASBO membership
• Statewide reputation for service within the association that serves as a model for other CASBO members
• Personal sacrifice of countless hours and personal resources to the association for the benefit of all CASBO members

**Associate Member of the Year Award**

In recognition of longtime service to CASBO and California schools, CASBO presents this award to a deserving associate member who has dedicated numerous hours of time and selfless energy on behalf of CASBO and its members. Award criteria include:

• One nomination, by someone other than the nominee, from each of the seven regional sections
• Service that has had a statewide effect with a quality and scope of work that transcends local and regional boundaries, benefiting the entire CASBO membership
• Statewide reputation for service within the association that serves as a model for other CASBO associate members
• Personal sacrifice of countless hours and personal resources to the association for the benefit of all CASBO members

**Section Member of the Year Awards**

CASBO presents these awards to one active individual member from each of its seven sections who are dedicated CASBO leaders that have made a significant contribution to school business management at the section level. These people have been selected by their section board peers to receive this special recognition. Award criteria include:

• Nomination by the appropriate section president who is someone other than the nominee
• Section-wide reputation for service within the association that serves as a model for other CASBO members
• Personal sacrifice of countless hours and personal resources to the association for the benefit of all section members

**Professional Council Meetings and Schedules**

Meetings must be approved by the Board of Directors at the beginning of the fiscal year. This occurs between April and June of every year. PCs will be given a set time during an event to conduct meetings.

**Meeting Locations**

Meetings of state governance groups are encouraged to take place at the CASBO office in Sacramento. The office is centrally located and accessible for most members with minimal travel costs. The conference room at the office has been designed with a capacity to host the majority of the association’s governance groups. Call CASBO at (916) 447-3783 to schedule your use of CASBO’s conference room.

When meetings, including PC governance meetings, are scheduled in locations other than the CASBO office, the following apply:
• Meeting locations must be chosen that are convenient for the majority of members attending.
• The choice of locations and activities must reflect positively on the association.
• No governance group meetings may take place out of state.

**Single-Day Meetings**

• In order to minimize the impact of travel on group members, decrease the need for overnight travel and contribute to the effective management of association resources, current CASBO policy requires all governance group meetings to be single-day, in-and-out meetings.
• Requests by individuals for overnight stays in conjunction with established meetings must be approved in advance by the CASBO’s CEO/executive director.

**Meeting Attendance Alternatives**

Current CASBO policy requires that half of all state committee and PC meetings take place via conference calls or through the use of CASBO’s virtual meeting providers. Section committees and PCs are also expected to use conference calls and virtual meetings to reduce meeting expenses and simplify member participation. To make arrangements for your conference call or virtual meetings, please contact Michelle Neto at mneto@casbo.org.

**Meeting Agendas and Minutes**

Appended to this resource manual are example templates for your use in crafting agendas for and taking minutes of PC meetings.

**CASBO Communications and Marketing**

**The Importance of Brand Management**

With every brand name comes a brand identity, and a responsibility to manage that brand identity. CASBO is no exception. As directed by CASBO by Design 2.0, we have developed guidelines to ensure a uniform look for all CASBO communications. This quick reference guide provides the basics of our brand identity and establishes graphic standards for all materials that carry the CASBO name, including all printed materials (magazine, newsletter and brochures), our website, logo wearables and other items, and PC and section materials.

People gain a perception about who we are based on what they see and read in our informational and promotional communications. So, whether we’re CASBO members, association leadership or professional staff, we’re all ambassadors of the CASBO brand.

We are in the process of updating our CASBO Style Guide and will have it published on our website very soon. In the meantime, here are a few things to know.

**Elements of Consistency**

A brand identity is the sum of all the various elements that combine to build an overall brand perception. The CASBO identity relies on the consistent use of a few simple elements:

• Logo usage at the state, section, committee and PC level, including taglines, fonts and colors;
• Partner indicia logo usage, including taglines, fonts and colors;
• CASBO taglines, fonts and colors; and
• Messaging and “voice” of the association.
Importance of Consistency
The strength of the brand relies on consistency. We are a professional association, and as such, we need to communicate our professional image through every exposure and touch point.

CASBO Logo
In doing research for the development of the CASBO logo, we conducted various brainstorming sessions, member surveys and focus groups. What came out of that research was our members’ belief that CASBO is an association of professionals. CASBO is a place of convergence, coming together, focus and collaboration. It’s a hub, a center, a focal point of information. From those themes, a logo was designed to include in the abstract:

- Elements of different sizes and shapes that converge toward a common goal
- Elements that signify information and resources radiating out
- Seven “wedges” to represent each of our regional sections

CASBO Taglines
Our tagline is another element which helps establish our brand identity. It’s a phrase that captures the overall focus of our association and how it benefits our members and potential members. CASBO has two taglines:

- Smart business. Smart schools.™
- The foremost authority on school business.

CASBO Federal Trademark
Our logos and taglines are federally trademarked to prevent their use by any other ASBO state chapter, association, private company or individual. This heightens the level of responsibility for all who use them in order to maintain the trademark.

Logo and Tagline Usage
We use our logos, taglines, colors, fonts and messaging consistently to reinforce the CASBO brand on:

- Print and digital collateral materials
- Website
- Wearables (apparel, hats, tote bags, etc.)
- PC, section and partner materials

Logo Wearables
CASBO members love logo wear! If you are serving in CASBO state and/or section leadership and wish to order logo wear for your group, please submit a Logo Request Form (casbo.org > Resources > Forms and Brochures > Logo Request Form) to provide to either your own graphic designer and/or product fabricator. If you don’t have your own, feel free to call upon CASBO’s approved, recommended provider (whom you are under no obligation to use):

A4 Promotions & Incentives | Attention: Jennifer Weber
3260 Ramos Circle | Sacramento, CA 95827
Tel: (916) 361-3682 | Fax: (916) 361-0677
Email: jennifer.weber@a4promo.com | Website: www.a4promo.com
Logo Usage Guidelines

Please follow these guidelines to maintain consistent usage of the CASBO brand.

- **GUIDELINE #1:** Don’t crowd the logo! The logo should be surrounded by clear space. It is imperative for easy readability of the logo and guarantees that the logo will maintain its integrity despite the other elements around it. A good rule of thumb: maintain clear space around the logo equal to the size of the square in the logo.

- **GUIDELINE #2:** Keep proportions constant. When placing a logo into a document (flyer, ad, brochure, etc.), it is important to use caution so as not to stretch or pull the logo, thereby distorting it from its correct dimensions. The logo is never to be stretched larger (in an effort to “fill” or accommodate existing space) or smaller (in an effort to save space). When placing the logo within a text layout document, like Microsoft Word or PowerPoint, constrain the proportions by holding down the shift key when resizing.

- **GUIDELINE #3:** Use the appropriate size of logo:
  - *Not too small:* The logo should be legible.
  - *Not too big:* The logo should not be overly dominant and should be in proportion with the other elements. A good rule of thumb: Logo should not be any wider than 3.5” on shirts.

- **GUIDELINE #4:** Use approved CASBO colors. Whenever you use the CASBO logo, you must use the approved two-color, black & white, or all-white versions, printed on a solid-color or white background. No substitutions.
  - **Two-color logo:**
    - Blue: Pantone 293C
    - Gray: Pantone Cool Gray 9C
  - **Black & white logo:**
    - Black: Pantone Black
    - Gray: Pantone Cool Gray 9C
  - **All-white logo:**
    - Reverse out of black or other solid color

- **GUIDELINE #5:** Use the correct section or PC logo. Custom logo variations are available and should be used. CASBO section and PC logos may not be altered or recreated.

- **GUIDELINE #6:** Use the CASBO fonts. CASBO has two official typefaces: Univers Condensed (sans serif) and Palatino (serif). Univers Condensed is the font used in the logo type and full name, as well as the main display font for our visual communications and collateral materials. Palatino is the primary text fond and can be used for display or larger font size usage.

  Each font family includes a range of weights (light, medium, bold), as well as the standard, regular and italic uses. Design discretion must be used when choosing varieties within each family.

  To facilitate the shared use of documents generated by CASBO members and staff and distributed universally in the personal computer environment, an alternate typeface solution has been established: For correspondence/business documents, our primary font is Arial, a contemporary sans serif typeface. Use it for text copy, as well as in headlines and subheads. Our secondary font is Calibri, which also is a sans serif typeface. Use it for captions, headlines, subheads and text as dictated by the design of each piece. Because these documents need to maintain a professional style, never use a script or decorative font. Other fonts for publications must be approved by CASBO’s communications team.

- **GUIDELINE #7:** Work with a CASBO staff member when creating specialty items. All specialty items reflect the CASBO brand. Work with our staff members when creating specialty items to ensure they properly reflect the brand image.
• **GUIDELINE #8:** Use consistent messaging. Talking points were created to ensure consistent messaging. Refer to them so that references to CASBO’s benefits, philosophy and mission are consistently referred to when talking about the association:
  
  o **In general:**
    - CASBO is the premier resource for business practices and policies in the education community.
    - Connect with industry leaders.
    - Discuss problems, share ideas and find solutions.
    - Become the expert at what you do and build your LEA’s capacity.
    - Stay informed on the issues of the day.
  
  o **Membership:**
    - CASBO thrives on member participation and contribution.
    - Connect with industry colleagues who are the informed and experienced feet on the ground in California public schools.
    - CASBO provides peer guidance and networking opportunities.
    - CASBO members are the voice of the industry.
    - CASBO is the place where school business leaders go to grow.
    - No other association can claim the breadth and depth of members in all school business disciplines.
  
  o **Professional Development:**
    - CASBO offers a career’s worth of growth opportunities.
    - CASBO is your source for professional development in all school business disciplines.
    - Leadership begins here.
    - CASBO provides content that evolves in direct response to member-expressed needs and California’s budget and policy changes.
    - CASBO offers in-depth training on today’s foremost topics, paired with solutions you can immediately implement in the real world.
    - Be the recognized expert in your discipline.
    - Build expert skills. Boost agency capacity. Benefit from a last investment in your future.
    - Get the skills you need to thrive in your professional life and lead and transform education.
  
  o **Advocacy:**
    - CASBO has a responsibility to provide advocacy and support for public school students.
    - CASBO aggressively advocates for sound policy in the areas of school business and finance, which is essential to quality public education.
    - CASBO seeks to influence state and federal policymakers on business and finance issues for the benefit of public education.
    - CASBO provides its members with effective advocacy support by educating elected officials and policy makers about issues affecting public education finance, labor law changes, and student success.

• **GUIDELINE #9:** Always follow the guidelines! Anytime the CASBO logo or name is used, it is a representation of the entire association. If the logo or name is used incorrectly, it can open the association up to potential legal liabilities. Think before using the CASBO logo or name. Also, using copyrighted material from other entities without permission exposes CASBO to potential legal liabilities. When in doubt, ask! Please contact Joyce Tribbey at jtribbey@casbo.org, and she’ll be glad to help.
Copyright Adherence
Any publications, reports and articles distributed as representative of CASBO shall be prepared with strictest adherence to all copyright laws, and full acknowledgment and credit shall be given for all resource and reference materials used. Any publications developed by a PC are the property of CASBO. CASBO’s CEO/executive director and other appropriate staff are the only individuals who may authorize others to reprint CASBO approved publications or articles.

The CASBO Website

All Things CASBO ... At Your Fingertips!
Find what you need quickly and easily on the CASBO website. We are continually designing and improving it to match the different ways you look for information online.

Use our easy navigation menu bar at the top of our home page, or click on the little magnifying glass in the upper right-hand corner and type your keyword(s) or phrase(s) into our site search tool.

Find Your CASBO Contacts
Find our member leaders, Board of Directors, partners and CASBO staff online:
1. Visit casbo.org
2. Hover your cursor over the “About” menu until the drop-down menu appears
3. Choose the group you’d like to view; for example:
   - Leadership
   - Committees & PCs
   - Partners
   - Etc.

Access CASBO Resources
Find resources such as forms & brochures, our newsletter, bookstore, etc., online:
1. Visit casbo.org
2. Hover your cursor over the “Resources” menu until the drop-down menu appears
3. Choose the resource you need; for example:
   - Job Listings/Career HQ
   - Membership Directory
   - Publications
   - Etc.

Peruse Professional Development Offerings
Find state and regional workshops and programs and register for them online:
1. Visit casbo.org
2. Hover cursor over the “Learn” menu until the drop-down menu appears
3. Choose the resource you need; for example:
   - Events
   - Workshops
   - Certifications
   - Etc.
See What’s Going on in Your Section
Learn about our seven sections, find your own, and register for or promote upcoming events:
Visit casbo.org > Sections:
- See the section map
- Access the Section Event Online Registration and/or Promotion Setup Request Form (also available under Resources > Forms and Applications)
- Find your own section page by clicking on your section name
- Etc.

Follow Our Governmental Relations Team
Stay up to date on CASBO’s efforts to advocate for sound legislative policy in the areas of school business and finance:
Visit casbo.org > Advocacy:
- Policy Action Center
- NewsBreak advocacy newsletter
- Ignite LCFF Budget Toolkit & LCFF Guides
Sample PC Meeting Summaries

October 10, 2012
Hello CASBO Southern Section Retirees!

As you may (or may not) know, the CASBO State Retiree Standing Committee has transitioned into the State Retiree Professional Council, with the same privileges and expectations as all the other State Professional Councils. Under the leadership of current chair Susi McLane, the Retiree Council members are reaching out to retirees in each section to encourage and invite you to participate in upcoming events and provide you with opportunities to share your expertise and experience with others in the profession and to catch up with your fellow retirees.

Invitation to Attend Events

As the Southern Section representative to the Retiree Professional Council, I'd like to invite you to attend the following events (see attachments to this email for details):

* Eastern Section/Southern Section Annual Vendor Show and Workshops (October 25, 2011, at the Pomona Fairplex/Sheraton Fairplex)

The annual vendor show will be held from 8:30 a.m. to 11:15 a.m., followed by four workshops held from 11:30 a.m. to 12:30 p.m. Registration for the vendor show and workshops is only $5. Parking is free and a complimentary continental breakfast will be served. Retirees are welcome to attend a workshop of their choice or, if there is enough interest, we could have our own separate meeting to discuss the role of retirees in the current school business/CASBO environment.

* Southern Section Job-Alike Workshops (January 27, 2012, in El Segundo, near LAX)

This popular annual event includes break-out, job alike sessions on Accounting/Attendance Accounting, CBOs, Child Nutrition, M&O/Facilities, Payroll/Human Services and Purchasing/Accounts Payable. Retirees are welcome to attend a job alike group of their choice, or, if there is enough interest, we could have our own separate meeting.

Early bird registration for CASBO members is $30 plus $3 for parking. There is a possibility that I might be able to partially subsidize the cost of retiree attendance.

Minutes of State Retiree Professional Council Meeting

The State Retiree Professional Council holds two official meetings each year; one at the Annual Conference and one in September. Attached to this email are the minutes of the April 9, 2011, meeting.

Feedback Requested

Since this is my first attempt at outreach to Southern Section retirees, I would appreciate your feedback on the following questions:
1) Do you want to receive further communications of this sort?

2) Do you have any interest in attending either of the events described in this email? If yes, which one(s)?

3) Are you interested in attending meetings of the local Southern Section Professional Councils (formerly known as Section R&D committees) (e.g., Finance, Payroll, Accounting, Child Nutrition)?

4) Are you interested in getting together informally with other CASBO retirees for lunch?

5) Would you be interested in applying for the position of Southern Section representative on the State Retiree Professional Council when that position becomes vacant in 2012?

6) As a retiree, how would you like to participate in CASBO?

7) Any other thoughts or comments?

Thank you in advance for your input. As a fellow retiree, I would like to create an environment where you, as a Southern Section retiree, feel that you have a voice and an opportunity to be as involved as you would like to be in the organization.

(insert name, contact information, and attachments)

_________________________________________________________________________

January 7, 2012
Hello CASBO Southern Section Retirees!

This is an update to the email I sent you in October 2011. All of the representatives on the CASBO State Retiree Professional Council are reaching out to retirees in each section to encourage and invite you to participate in upcoming events and provide you with opportunities to share your expertise and experience with others in the profession and to catch up with your fellow retirees.

Invitation to Attend Southern Section Job-Alike Workshop (January 27, 2012, in El Segundo, near LAX)

As I mentioned in my prior email, CASBO Southern Section is holding their annual Job-Alike Workshop on January 27, 2012 (see attached flyer). This popular yearly event will include seven break-out, job-alike sessions on issues relevant to Accounting, Attendance Accounting, Chief Business Officials, Child Nutrition, M&O/Facilities, Payroll/Human Resources and Purchasing/Accounts Payable. Retirees are welcome to attend a job alike session of their choice.

In addition, if there is enough interest, I'd like to hold a separate break-out session for retirees to discuss issues of interest to you and the types of workshops, sessions, etc. you'd like to see offered for retirees, either at the Annual Conference or at Southern Section events. While Job-Alike registration for CASBO members is $30/$35 and $38 for non-members, CASBO Southern Section will pay for your registration if you notify me of your intent to attend by Wednesday, January 18th. Parking ($3) is on your own.

Minutes of State Retiree Professional Council Meeting

The State Retiree Professional Council holds two official meetings each year; one at the Annual Conference and one in September. Attached to this email are the minutes of the September 15, 2011, meeting. Attached to your prior email were the minutes of the meeting held at the April 2011 conference.
Feedback Requested

The feedback I received from my October email indicated that most of you wanted to receive additional updates. Some wanted to get together for lunch and others said they might want to participate more actively in the future. For those of you who did not respond in October, I'm including below the questions I asked in my first email:

1) Do you want to receive further communications of this sort?

2) Do you have any interest in attending either of the events described in this email? If yes, which one(s)?

3) Are you interested in attending meetings of the local Southern Section Professional Councils (formerly known as Section R&D committees) (e.g., Finance, Payroll, Accounting, Child Nutrition)?

4) Are you interested in getting together informally with other CASBO retirees for lunch?

5) Would you be interested in applying for the position of Southern Section representative on the State Retiree Professional Council when that position becomes vacant in 2012?

6) As a retiree, how would you like to participate in CASBO?

7) Any other thoughts or comments?

Thank you for your input. As a fellow retiree, my goal to create an environment where you, as a Southern Section retiree, feel that you have a voice and an opportunity to be as involved as you would like to be in the organization.

(insert name, contact information, and attachments)

March 22, 2012

Hello Southern Section Retirees!

Conference Update

The 2012 CASBO Conference is just around the corner and it's being held in sunny San Diego (a relatively easy drive for Southern Section members) from April 10-13. Registration for retirees is $85. Workshops that are geared specifically for retirees will be held on April 11-13 and include:

- Your Retirement Plan at Work
- Estate Planning - Wills and Trusts
- Retirement - Expectations versus Reality
- Health Care Reform and Medicare
- Retirement is Just the Beginning
- How to Hire a Retiree
- Working in Retirement

All Retirees Invited to Attend the Retiree Professional Council Meeting at the Conference

The State Retiree Professional Council will be holding its annual meeting for retirees during the conference to review 2011-12 accomplishments and to plan for 2012-13. **All retirees attending the conference are invited and encouraged to attend.** The meeting will be held:

- **Date:** Thursday, April 12
- **Time:** 1:30 to 3:45 p.m.
- **Location:** At the conference - room to be announced

Retiree Meeting Held at January Job-Alike Event

On January 27, 2012, CASBO Southern Section held its annual Job Alike event, attended by over 200 persons. In addition to the other break-out sessions that focused on specific school business disciplines, I hosted a Retiree break out-session, which was attended by four retirees. While our group was small, we had a great discussion, which included suggestions for future conference topics on issues faced by retirees. Some of the suggestions made and issues raised included:

- Conference sessions for retirees should be consolidated on the days that most retirees attend.
- Conference workshops should be held on topics such as *How do I Become a Consultant* (how to price your services, whose contract do you use, panel discussion); *How to Market Yourself as a Consultant* and *Staying Current with Technology*.
- How often do districts use the Retiree Interim Service Search section on the CASBO Website to hire retirees as consultants? How can CASBO help market retirees to districts? Can County Offices help with this?
- Can School Services of California offer a special subscription rate for retirees who work part-time at districts?

I hope to see some of you at the Conference and at the April 12th State Retiree Professional Council meeting! Let me know if you have any questions or suggestions.

*(insert name, contact information, and attachments)*
Sample State Leadership Applications Announcement

2019-20 Leadership Appointments

The application period for open leadership positions on CASBO state committees and professional councils is now open!

If you are a CASBO individual member\(^1\) who would like to give back to the profession, improve your leadership skills, or expand your network of colleagues, we encourage you to apply. (And if you know another CASBO member who would be interested, please spread the word!)

All leadership terms begin at the end of this year’s Annual Conference. If you are interested in volunteering, please review the CASBO Manual of Procedures\(^2\) for eligibility requirements and the responsibilities involved for each committee or professional council.

Applications are due by **Friday, February 22, 2019**. To be considered for appointment, please complete and submit your Form 16.\(^2\) Once received, the CASBO Nominations & Elections Committee will review and present your application to the CASBO officers charged with making the appointments.

\(^1\)For purposes of eligibility, “a CASBO individual member” is a current Organizational Subscription Employee Member, Career Builder Member, Honorary Life Member or Retiree Member (Retiree Members may serve only on the Retiree Professional Council).

\(^2\)All forms and documents necessary to apply for a leadership appointment are available on the CASBO website at casbo.org.

The following positions are open for appointment. Please submit applications **ONLY** for the positions listed. Applications submitted for positions that are not eligible will be disqualified.

**State Operational Committees**

**Associate Member Committee:**
- (2) Associate Member Positions

**Awards Committee:**
- (1) Member @ Large

**Continuing Education & Certification Committee:**
- (1) Northern Section Representative
- (1) Southern Section Representative

**Legislative Committee:**
- (1) Member @ Large
- (1) Sacramento Section Representative (one (1)-year term)
- (1) San Diego/Imperial Section Representative (one (2)-year term)
- (1) Southern Section Representative

**Professional Standards & Leadership Committee:**
- (2) Members @ Large
- (1) Member @ Large (one (1)-year term)
Professional Councils

Accounting:
(1) Central Section Representative
(1) Southern Section Representative

Chief Business Officials:
(1) Central Section Representative
(1) Sacramento Section Representative (one (1)-year term)
(1) Southern Section Representative

Charter Schools:
(1) Central Section Representative
(1) Eastern Section Representative
(1) Northern Section Representative
(1) Sacramento Section Representative
(1) San Diego/Imperial Section Representative
(1) Southern Section Representative

Child Nutrition:
(1) Central Section Representative
(1) Southern Section Representative

Facilities:
(1) Central Section Representative
(1) Southern Section Representative
(1) Shasta Cascade Section Representative*

Financial Services:
(1) Eastern Section Representative
(1) Northern Section Representative
(1) Sacramento Section Representative (one (2)-year term)

Human Resources:
(1) Eastern Section Representative
(1) Northern Section Representative
(1) Sacramento Section Representative (one (2)-year term)
(1) Shasta Cascade Section Representative

Maintenance & Operations:
(1) Eastern Section Representative
(1) Northern Section Representative
(1) Southern Section Representative (one (1)-year term)

Payroll:
(1) Eastern Section Representative
(1) Northern Section Representative
(1) San Diego/Imperial Section Representative (one (2)-year term)
(1) Shasta Cascade Section Representative*

Purchasing:
(1) Eastern Section Representative
(1) Northern Section Representative
(1) Sacramento Section Representative (one (2)-year term)
(1) Shasta Cascade Section Representative (one (1)-year term)
Retiree:
(1) Sacramento Section Representative
(1) San Diego/Imperial Section Representative
(1) Shasta Cascade Section Representative*

Risk Management:
(1) Sacramento Section Representative
(1) San Diego/Imperial Section Representative
(1) Shasta Cascade Section Representative

Special Education:
(1) Central Section Representative
(1) Eastern Section Representative
(1) Northern Section Representative
(1) Sacramento Section Representative
(1) Shasta Cascade Section Representative
(1) Southern Section Representative

Technology:
(1) Sacramento Section Representative
(1) San Diego/Imperial Section Representative

Transportation:
(1) Sacramento Section Representative
(1) San Diego/Imperial Section Representative
(1) Southern Section Representative (one (2)-year term)
(1) Shasta Cascade Section Representative*

*The Shasta Cascade Section Representative is appointed upon approval of the Shasta Cascade Section Board.

Deadline to submit applications:
Friday, February 22, 2019

Need assistance with the leadership application process?

Michelle Neto
Director, Governance & Leadership
mneto@casbo.org
(916) 504-2254
2019-20 Board Meeting Submission Deadlines and Agenda Schedule

2019-20 Professional Council Deadlines

PC Chair Board Reports Due                     September 30, 2019
PC Chair Board Reports Due                     January 6, 2020
Applications for State Leadership Appointments (PCs & Committees) Due February 14, 2020
PC Chair Board Reports Due                     March 9, 2020
PC Annual Meetings & Events Calendar Due       May 15, 2020
PC Chair Board Reports Due                     May 18, 2020

2019-20 Board Meeting Agenda Schedule

<table>
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<th>Board Meeting Date</th>
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<td>Final Agenda Packet Review:</td>
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CASBO Federal and State Legislative Platforms

California Association of School Business Officials

Advocating for our Students’ Future
Our Federal Platform
Advocating for our Students’ Future

Founded in 1928, CASBO has supported public schools and school leaders in California by providing professional training and creating opportunities for collaboration in every facet of school business management and operations.

CASBO represents 22,500 school business officials in all K-14 business disciplines, ranging from Chief Business Officers to Maintenance and Operations, and Technology Directors.

Our Mission Statement

The mission of CASBO, the trusted authority on school business operations, is to support the success of all students through leadership, innovative professional development, and advocacy.

Advocacy Principles

1. **Robust, High-Quality Education.** CASBO supports a robust school finance system that empowers local-educational agencies to invest in high-quality instructional services and programs that meet the needs of our students.

2. **Safe Learning Environments.** CASBO supports policies that foster local innovation to improve student achievement and create safe and optimal learning environments for our students, educators, and local communities.

3. **Fiscal Responsibility.** CASBO believes that public trust requires personal and professional accountability and responsibility and, in that spirit, CASBO supports sound policies that benefit public education and student success, consistent with the requirements of the state’s Local Control Funding Formula.

4. **Commitment.** CASBO strives to be a voice for public education and its students, and to work collaboratively with all stakeholders, including the Education Coalition, education management associations, community-based organizations, and elected officials. We support policies that invest in our public schools and further California’s goals to improve student achievement and success.

California Association of School Business Officials | 1001 K Street, 5th Floor | Sacramento, CA 95814 | www.casbo.org
Our Advocacy Platform

CASBO strives to be a voice for public education and to work collaboratively with all stakeholders, including parent and student organizations, elected officials and policy-makers, and community based organizations that both invest in public education and further California’s goal to improve student achievement and success.

Invest in Public Education

❖ Congress must act on passing a balanced budget that steers away from further funding reductions to public education.
❖ Congress must prioritize additional federal funding for grants under the Every Student Succeeds Act (ESSA) and Individuals with Disabilities in Education Act (IDEA).

Support K-12 Infrastructure

❖ Congress should support policies that improve access to infrastructure financing options, such as federal and state funds, public-private partnerships, and tax-credit bonds.
❖ Congress must protect bond provisions used to underwrite public school infrastructure improvements to ensure schools to maximize limited resources to provide safe and healthy environments for our students.
❖ Congress must reinstate net neutrality as it impacts our rural and small school districts.

Create Sustainable Child Nutrition Programs

❖ Congress should increase federal reimbursements for child nutrition meal programs.
❖ Congress should provide additional federal grants and loan assistance to finance kitchen infrastructure and equipment.
❖ Congress must reject proposals that change the Community Eligibility Provision (CEP), which enables high-poverty schools to serve meals to all students at no charge, improves meal program efficiency, and reduces administrative burdens.

Improve Access to Health Services

❖ Congress must improve access and funding for quality health and wellness programs.
❖ Congress must support funding and support programs that states and schools rely upon to serve their students, such as the Medicaid and Children’s Health Insurance Program (CHIP).
Early Education Accountability & Governance

Charter Schools

Support
CASBO commends Gov. Newsom’s continued support to invest in public education through LCFF, empowering local educational agencies (LEAs) to serve and respond to their students’ needs. We believe that as the fifth largest economy in the world, we must make further strides toward ensuring all students have access to safe, high-quality educational environments. We look forward to working together to assist public schools in addressing their fiscal obligations while supporting all students’ educational needs.

Special Education
Support funding with modified distribution method
CASBO applauds Gov. Newsom for recognizing the dire need for additional financial support to meet the needs of our students with disabilities. We believe these funds can be a first step toward equalizing AB 602 funding rates and establishing per pupil target rates at the 95th percentile, recognizing services provided to preschool students, and providing a supplemental rate for students with severe disabilities.

Facilities
Support
CASBO supports the historic partnership between the state and LEAs to finance school facility construction and modernization projects. We support the release of $1.5 billion in Proposition 51 dollars and staffing increases at the Office of Public School Construction. We urge the Administration and Legislature to fund the remaining workload list in the budget year, to expedite projects awaiting resources.

Addressing Pension Obligations
Support
CASBO supports Gov. Newsom’s recognition of the mounting pressure that pension contributions impose on limited school funds, which could otherwise be expended on educational services. We appreciate the proposal to reduce the school employers’ CalSTRS contribution rates, allowing funds to return to the classroom. We urge the development of a long-term strategy to generate new sustainable funds that align with the cost of delivering educational services, meet pension and health care obligations, and help attract and retain staff at all levels of public education.

Early Education
Support
CASBO supports Gov. Newsom’s proposal to fund infrastructure costs to add new classroom spaces to implement full-day services, with recognition for hardship requirements for small school districts. We also support the additional preschool slots and appreciate the funds provided for child care facilities but suggest that the split of resources between facilities and personnel recognize that facility costs may require more than half of the available resources. A next step will need to be considerations for workforce development and training.

Charter Schools
Accountability & Governance
CASBO appreciates Gov. Newsom’s commitment to implement statewide accountability policies on all LEAs, including charter schools. Since the enactment of the Charter School Act, the state has not revised the governance and petition structure. We would encourage discussions with a focus to improve student outcomes and the fiscal health of public education.

Thank you for supporting California’s public schools and students.
Over 65 language spoken

- 83% Graduation Rate
- 58% Low-income students
- 20.4% English Language Learners
- 12.5% Students receiving special education services
- 34,420 Foster youth
- 277,716 Homeless students

6,220,413 students

313,989 teachers

- 5,873 elementary schools
- 339 K-12 schools
- 1,296 middle schools
- 1,311 high schools
- 1,026 total school districts
- 1,306 charter schools

Special Education

In 2017-18, special education services were provided to 774,665 individuals. The federal government, state, and local resources totaled over $13 billion, with LEAs covering 60 percent of costs to ensure students’ academic success and wellness are met despite the fiscal challenges.

Top 5 categories:
- Specific learning disability: 38 percent
- Speech/language impairment: 20 percent
- Autism: 14.5 percent
- Other health impairment: 12.5 percent
- Intellectual disabilities: 5.7 percent

Proposition 98

Dollars in Billions

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2018 Education Week’s Quality Counts ranking in per-pupil spending: 46th in the nation

2018-19 Funding by Source

- K-12 Education
  - Proposition 98: $67.9 billion
  - LCFF portion: $62 billion
  - Funding per student: $11,574

- Community Colleges
  - Proposition 98: $9.2 billion
  - Enrollment: 1,136,214
  - Funding per student: $8,099

Source: California Department of Education, Legislative Analyst’s Office, Department of Finance (2017-18 data)
To: Christina Aguilar, President  
From: Andrew Soliz, Child Nutrition Professional Council Chair  
Regarding: Board Report  
Date: April 15, 2019

The Child Nutrition Professional Council is excited to present outstanding educational sessions at this year’s Annual Conference. The conference provides the opportunity for our Professional Council members to come together and collaborate on topics that impact our daily business of serving education. In preparation of our educational sessions, we had the opportunity to work with a CASBO vendor to provide a session on the acceptance of gift and ethics laws, a hot topic within the Child Nutrition field.

Child Nutrition once again is a hot topic for the legislature. Elizabeth Esquivel reached out to the Child Nutrition Professional Council for our feedback on a couple of Child Nutrition bills that the author’s offices wanted feedback from CASBO. The Child Nutrition Professional Council gratefully submitted input, and we look forward to seeing where the various bills end up.

San Diego/Imperial Section continues to look for ways to reach members in their area. Jennifer Marrone attended a local California School Nutrition Association meeting and discussed the opportunities to collaborate and hold joint meetings. In working together with other associations allows for greater participation and exposure for CASBO’s work in the San Diego/Imperial Section.

Thank you!
PC Meeting Agenda Template

(Name of Committee)

Date of Meeting: (Current Date)
Location: (Select Location)
Time: (Select Time)

Chair: John Doe
Members: (Committee Members names)

CASBO STAFF: (CASBO Staff)

Invited Guests: Optional

A G E N D A

ITEM 1  APPROVAL OF AGENDA  (amount of time) minutes

ITEM 2  REVIEW OF MINUTES FROM (insert previous meeting date) MEETING
Presented by: (Presenter’s Name)  ____ minutes
Action Item:  Y    N

ITEM 3  Presented by: (Presenter’s Name)  ____ minutes
Action Item:  Y    N

ITEM 4  Presented by: (Presenter’s Name)  ____ minutes
Action Item:  Y    N

ITEM 5  Presented by: (Presenter’s Name)  ____ minutes
Action Item:  Y    N

Adjourn

Future Meetings/DATE/LOCATION:

   Date of next meeting
   Address of next meeting

Attach Committee Roster with all contact information

Attach MINUTES from previous meeting

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PC Meeting Minutes Template

(Name of Committee)

Date of Meeting: (Insert Date)
Location: (Select Location)
Time: (Select Time)

Chair: (John Doe)
Members: (Member Names)
CASBO STAFF: (CASBO Staff)
Invited Guests: Optional

ABSENT: (Committee Members Absent)

MINUTES

ITEM 1  REVIEW OF MINUTES FROM (Insert previous meeting date) MEETING
Presented by: (Insert presenter’s name)
Action Item: Y   N
Note any changes to the minutes here.
AYE _____ NAY ______ ABSTAIN ______

ITEM 2  (Insert Item 2 Topic)
Presented by: (Insert Presenter’s Name)
Action Item: Y   N

ITEM 3  (Insert Item 3 Topic)
Presented by: (Insert Presenter’s Name)
Action Item: Y   N

ITEM 4  (Insert Item 4 Topic)
Presented by: (Insert Presenter’s Name)
Action Item: Y   N

Time of Adjourn: __________

TO DO:
Person responsible/specific action to be taken/timeline
Person responsible/specific action to be taken/timeline
Person responsible/specific action to be taken/timeline

Future Meetings/DATE/LOCATION:
(Insert date of next meeting)
(Insert location of next meeting)

Attach Committee Roster with all contact information