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A Letter From the President and CEO & Executive Director

July 26, 2019

Congratulations on receiving the newest edition of our resource manual for CASBO Sections! Our goal is to create a resource that will provide section leaders with information and materials to assist in the operation of your section and in your program planning. 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.

Section programs and activities are a vital link for many school business officials. Often, your programs are the only professional development that local education agencies support. Making sure that our programs and workshops are welcoming, pertinent and well-presented is essential for our future success. Sections are where professional networking and relationships begin, and our goal is to help you to make your section activities and programs successful!

If you are currently active in your section, thank you! Your participation 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
CASBO President

Molly McGee Hewitt, CAE
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).
- 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 Regional Sections

There are seven sections (casbo.org > Sections > Overview) that divide the state geographically to allow for local collaboration among and between CASBO members. The boundaries of each section within the CASBO organization are defined below.

1. **Shasta Cascade Section**
   Butte, Colusa, Del Norte, Glenn, Humboldt, Lake Lassen, Mendocino, Modoc, Plumas, Shasta, Sierra, Siskiyou, Tehama and Trinity Counties

2. **Sacramento Section**
   Alpine, Amador, El Dorado, Marin, Napa, Nevada, Placer, Sacramento, San Joaquin, Solano, Sonoma, Sutter, Yolo, and Yuba Counties

3. **Northern Section**
   Alameda, Contra Costa, Monterey, San Benito, San Francisco, San Mateo, Santa Clara, and Santa Cruz counties

4. **Central Section**
   Calaveras, Fresno, Kern, Kings, Madera, Mariposa, Merced, San Luis Obispo, Stanislaus, Tulare, and Tuolumne counties

5. **Southern Section**
   Los Angeles, Santa Barbara, and Ventura counties

6. **Eastern Section**
   Inyo, Mono, Orange, Riverside, and San Bernardino counties

7. **San Diego/Imperial Section**
   San Diego and Imperial counties

Per CASBO Bylaws, the CASBO Board of Directors establishes the number and boundaries of the sections and may modify the number and boundaries from time to time as it deems appropriate.

Purpose of the Regional Sections

CASBO regional sections have been established to:

- Support and promote the goals and objectives of CASBO as defined in our current member-driven strategic plan, [CASBO by Design 2.0](https://casbo.org/about/casbo-by-design-2.0) (adopted October 2017; casbo.org > About > CASBO by Design 2.0), and with the approval of the CASBO Board of Directors.
- Provide opportunities whereby individuals who work in the school business profession can meet about, discuss and study all phases of school business administration.
- Support the improvement of schools in California, from the perspective of school business professionals, for the benefit of all students.
• Assist in the effective and efficient operation of schools and school systems in California by facilitating the exchange of information and best practices among school business professionals about topics related to school business administration.

Inside the Regional Sections

Each section has four officers: a president, president-elect, secretary and treasurer, each of whom also serves as a member of the Section Board of Directors. All officers must have at least one year of experience at the state or section level as a board, standing committee or professional council (PC) member, or have exhibited active participation at the section or state level in other capacities. All officers must be active Organizational Subscriber Employee Members, Career Builder Members or Honorary Life Members in good standing with CASBO for a period of not less than two years and not retired from school business.

Members of the Section Board of Directors shall be active Organizational Subscriber Employee Members, Career Builder Members, Honorary Life Members and Associate Members in good standing with CASBO and not retired from school business.

Membership of the section, including officers and the Section Board of Directors, is comprised of those persons and entities whose membership is in good standing with CASBO and who reside or are employed within the boundaries of the section.

Each section is under the control of the CASBO Board of Directors and abides with all provisions of the CASBO Bylaws and policies, the decisions of the CASBO Board of Directors, and the section’s bylaws and policies. Appended to this resource manual is an example template for section bylaws.

Section Board of Directors Composition

The Section Board of Directors consists of the four section officers, the immediate past president, four directors elected by section members, the member who is serving as the section director on the CASBO Board of Directors, and a non-voting liaison from the section’s associate membership who is appointed by the section president. Section board members’ terms are for a period of one year, except that the term of the section director who is serving on the CASBO Board of Directors is for the duration of his or her term on the CASBO Board of Directors; and the term of the non-voting liaison from the section’s associate membership is for three years. Terms begin at the close of the CASBO Annual Conference.

Officer and Director Succession

Once each year, a president-elect, secretary, treasurer and the four section board members who are not section officers are elected for a term of one year by qualified section members, who are defined as active Organizational Subscriber Employee Members, Career Builder Members and Honorary Life Members who are in good standing with CASBO. Appended to this resource manual is an example of an annual solicitation for applications for section leadership positions. The CASBO state office is available to assist in announcing open section leadership positions. Please contact Joyce Tribbey at jtribbey@casbo.org for further details.

A majority vote of qualified section members participating in the election shall be sufficient to elect a person to take office, provided that a quorum of a majority of qualified section members cast ballots in the election. At the close of the term of the president-elect, he or she advances to the position of president. Terms begin at the close of the CASBO Annual Conference.

A vacancy shall be deemed to have occurred in one or more of the following instances:
• An officer/director is no longer eligible for membership in CASBO.
• An officer/director resigns his or her position.
• The Section Board of Directors finds that the officer/director has abandoned the position by not attending two consecutive board meetings or by failing to carry out the duties of the position.
• An officer/director is removed from office by the CASBO Board of Directors.

Vacancies shall be filled by the Section Board of Directors for the remainder of the term. In the case of the president vacating his or her office, the president-elect shall take office as president for the remainder of the original term and shall also serve the full term for which he or she was elected. The Section Board of Directors shall then call for an election to fill the position of president-elect to cover that same time period.

**Section Job Descriptions**

All section officers are expected to develop, recruit and assist in retaining individual, organizational and institutional memberships in CASBO. Following are the main job descriptions for section leadership; for additional information, please refer to the Section Bylaws Template example located in the appendix.

**Section Board of Directors**

Duties of the Section Board of Directors include:

• Meeting regularly at the call of the section president.
• Approving an annual budget for the section.
• Approving all expenditures incurred by the section.
• Approving an annual schedule of events for the section.
• Assisting the section president with appointments to section committees and PCs.
• Assisting with the general operation of the section, including individual assignments and tasks, arranging programs or meetings, developing communications with members, etc.
• Selecting for the following term the associate member who will be a member of the Section Board of Directors.
• Ratifying section committee and PC appointments made by the section president.
• Filling vacancies as provided in the Section Bylaws and CASBO Bylaws.
• Developing, recruiting and assisting in retaining active memberships in CASBO.
• Ensuring that a member election is held annually to elect section officers and every three years to elect a section director to the CASBO Board of Directors.

**President**

The president shall serve as chair of the section board of directors, preside at all section meetings, appoint members of section committees, serve as an ex-officio member on all section committees and generally ensure the successful operation of the section.

**President-Elect**

The president-elect shall assume the duties of the president when the president is absent and assist the president in ensuring the successful operation of the section.

**Secretary**

The secretary shall keep the official records and minutes of each meeting of the section board of directors and maintain other records of the section, including correspondence.
**Treasurer**

The treasurer shall promptly collect and deposit all section funds, approve and pay section bills, maintain itemized records of all receipts and disbursements of section funds, prepare monthly statements for presentation to the section board of directors, prepare an annual budget for the section, assist CASBO with an audit of section funds and other duties associated with the successful operation of the section.

**Section Committees and Professional Councils**

Sections have a structure of standing committees, PCs and ad-hoc committees to ensure CASBO member involvement and input into the section and CASBO on issues of interest to school business professionals.

Membership on section standing committees, PCs, and ad-hoc committees, including chairs and assistant chairs, is reserved for individuals whose membership is in good standing with CASBO and who reside or are employed within the boundaries of the section.

The section president appoints the chairs of section PCs. The term of each section PC chair is for three years. Part of each section PC chair’s responsibilities includes serving as a section representative to the corresponding state PC. The schedule of section PC chair appointments coincides with the need at the state level to ensure that no more than one-third of the members of state PCs are appointed in the same year.

**Professional Council Section Representative Appointments**

Individuals may apply for appointment to specific state PCs via the CASBO appointments process. Candidates interested in serving as a section representative to a state PC 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 state leadership appointments.

**Section 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 section PC. Individual section PC member responses to inquiries from CASBO staff as well as the professional network of each PC section member is critical to CASBO’s success in the legislative arena.

**Initiation of Legislation**

Section PCs are strongly encouraged to recommend legislative proposals and platform statements to the Legislative Committee (casbo.org > About > Committees & PCs).

**Evaluation of Legislation Proposed by Others**

The Legislative Committee or CASBO staff may refer legislative proposals to a section PC for review and input. Section 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. Section 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, track votes and stay informed on important issues of the day. Members can also learn more by reading CASBO’s policy positions and by engaging with our CASBO Advocacy Network.

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

Section 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 section 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.

Section State Director Report 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 state directors with the following timelines for submitting state director reports. CASBO provides an advance agenda to board meeting attendees which includes state director 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 state director report should be to inform and enlighten the board on the section’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 section name, the state director’s name 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 state director report prepared for a board meeting.

After the Board of Directors meeting concludes, the CASBO state office will prepare a board recap report and send it to the state director for review and comment. Once finalized, CASBO
will email the report on behalf of the state director to the section members. Appended to this resource manual is an example of a board recap report.

**Section Budget**

Section boards are responsible for overseeing the expenses of their sections, managing their budgets, and ensuring their sections follow CASBO policies.

**Section Expenditures**

In order to encourage collaboration in the ongoing management of the association’s budget, and to ensure that CASBO’s president, CEO/executive director and Board of Directors are included in and apprised of key budgetary decisions for which they are held responsible, section boards seeking to expend section funds in excess of $5,000 must seek prior approval of CASBO’s president and CEO/executive director, either in writing or using electronic communication, a copy of which must be maintained as part of the section records for auditing purposes. All section members must be current CASBO members with paid dues; reimbursements will be withheld for non-members.

Approved expenditures are limited to travel to section meetings, education materials and section logo wear (unless specifically authorized by the CASBO 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, section 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 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 section leaders with information 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 other section members and state and section PC members 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-likes, 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:
  o Centers,
  o TED Talks,
  o Panels of experts,
  o Point and counterpoint speakers, and
  o 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>Session Style</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>
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<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>
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</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:
  - What’s your name and where do you work?
  - What is your title or position, and how long have you been in your current role?
  - What are your major responsibilities and greatest challenges?
  - What do you need to be more effective in your job?
  - What one piece of advice would you offer to people new to our profession?
  - 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:
  o Subject relevance,
  o Interest to our members,
  o Political acumen, and
  o 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:
    o Only after first considering those above, or
    o 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)
  • Professional associations
  • Students
  • Parent-Teacher Associations
  • Constituent leaders
  • Local business or chamber members

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

**Section Event Registration Setup and Promotions**
The CASBO state office provides section leadership with assistance in setting up event registration, posting event information on the CASBO website, and promoting section events via its bi-weekly California School Business News and monthly Section Event News newsletters.
Registration and Promotion

Once you have your event details finalized and are ready to open registration and promote your event, please complete the CASBO Section Event Online Registration and/or Promotion Setup Request (casbo.org > Resources > Forms and Applications).

Your event will be posted on the CASBO website:

- On your section’s Calendar of Events page (casbo.org > Section Overview > Choose Section Name > View Calendar).
- On the main Section Workshops page (casbo.org > Learn > Workshops > Section).
- On the main CASBO Calendar page (casbo.org > Learn > Calendar).

A short description will be provided, with links to the online registration page on the CASBO website. Because the website description is brief, it’s helpful to create a more detailed event flyer to share additional information about your event. If you choose to provide an event flyer, please be sure to upload it in the designated field of the setup request form.

Guidelines

- All requests to CASBO to handle section event online registration and promotion must be sent 10 business days prior to opening of event registration.
- Please upload your event flyer in Word format (not PDF). It will be edited for CASBO and Associated Press style and to add the CASBO online registration link. A final copy will be provided to you as soon as your event is posted on the CASBO website.
- Monies collected will be sent to the section as follows:
  o Check for all funds collected – 10 business days after the event.
  o Remainder of collected funds – 10 business days after all invoices have been paid.
  o Any monies collected by CASBO after the event are subject to a 10% collection fee.
- If the section would like to act as its own collection agent so as not to incur fees, CASBO will send the section a list of outstanding invoices so it can contact those people with unpaid invoices to have them remit payment directly to CASBO.
- If you have any questions about section event online registration, please contact Michelle Neto at mneto@casbo.org
- If you have any questions about section event promotion, please contact Joyce Tribbey at jtribbey@casbo.org

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 Sections Can Attract and Retain Through Micro-Volunteering

- Create a master list of volunteer opportunities in your section.
- 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
  - Number of meetings
  - Length of time
  - 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 Sections 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. Sections 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. For nomination forms, please visit our Awards web page (casbo.org > About > Awards), and contact Gail Hillis 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.

Scholarships  
Sections offer both their own section-specific scholarships (e.g., the Central Section Pat Kraft Memorial Scholarship [casbo.org > Sections > Central > Scholarships], the Heroes of the...
Eastern Section Scholarship [casbo.org > Sections > Eastern > Scholarships], etc.), and can participate in the AMC’s Robert Reeves Scholarship.

Robert “Bob” Reeves Scholarship

In honor of Robert E. Reeves, longtime CASBO member and treasurer, who passed away August 30, 2006, this scholarship promotes continuing education and training for CASBO members. Preference is given to those applicants pursuing formal education or professional certifications, and scholarship criteria include:

• Amount: $1,000
• Sponsored by: Associate Member Committee
• Eligibility: Available to current CASBO members:
  o Whose section has an active AMC liaison;
  o Who have not received the scholarship within the past five (5) years; AND
  o Who meet one (1) of the following requirements:
    ▪ Must be enrolled in an education program which will lead to or promote progress within a school business profession as a CBO or other school business professional at the elementary, secondary or community college levels; or
    ▪ Must be employed in the education field with a desire to expand your knowledge related to a school business profession as a CBO or other school business professional; or
    ▪ Must be a post-graduate candidate in a school business profession at a college or university in support of CBO or other school business professional training.

The application period is July 1 to September 30 each year. CASBO and the AMC make an announcement recognizing the successful recipients from each section during the next Annual Conference and in CASBO publications.

Scholarship funds are available for the prescribed period of each CASBO fiscal year. There is no rollover of scholarships if not awarded. Applicants are requested to keep documentation of the use of the scholarship for IRS review. If funds are not expended for educational purposes, taxes may be due. Appended to this resource manual is an example of a Bob Reeves Scholarship solicitation package and internal section guidelines and resources for administering the scholarship.

For more information about scholarships, including our state-administered Annual Conference Scholarship, please visit our Scholarships web page (casbo.org > About > Scholarships).

CASBO Associate Members

Associate members are valuable partners in carrying out the mission of CASBO. Associate members are vendors and suppliers who have made a commitment to our association through their membership and participation. Sections should seek to involve associate members in the ongoing activities of the section, including participation on section committees and PCs. Appended to this resource manual is our Associate Membership brochure which describes the benefits of being a CASBO associate member in detail.

CASBO Partners

CASBO partners are CASBO associate members who have been carefully vetted to ensure they are of the utmost value to our members and offered the opportunity to become a valued CASBO partner. Partnership is offered at three levels: Strategic Alliance, Premier Plus and Premier. To become a CASBO Strategic Alliance Partner, a company must be an existing Premier Plus or Premier Partner, be considered for approval by CASBO’s Board of Directors,
and enter into a revenue sharing agreement with CASBO. Appended to this resource manual is our Partnership Program brochure, which describes the benefits of being a CASBO partner in detail.

**CASBO Associate Member Committee**

The Associate Member Committee (AMC; casbo.org > About > Committees & PCs) is composed of associate members who are appointed for three-year terms and act as representatives to the CASBO Board of Directors, sections and PCs. They operate much like a PC in the CASBO organizational structure. The AMC chair also serves on the CASBO Board of Directors.

Each section also has an associate member liaison to help with local events and activities. Section liaisons meet with section boards and play a vital role in section events.

The AMC supports CASBO in a variety of significant ways, including:

- Administering the Robert Reeves Scholarship Program.
- Administering the Sky Joyner Award (CASBO’s highest honor to a member for service to the association and the profession).
- Supporting CASBO events, including financial support of the Annual Conference First General Session and the CBO Symposium reception.
- Serving as members on a variety of association committees.
- Directing and implementing the Annual Conference Scholarship Golf Tournament and the awarding of scholarship funds.
- Supporting the Annual Conference Hospitality Suites.
- Supporting and participating in the Associate Member Academy program.
- Sponsoring events and programs at the state and section levels.
- Providing speaker and program assistance at the section level and for Annual Conference through the AMC Speakers Bureau (casbo.org > Sections > Overview) and other methods.
- Participating in CASBO by Design 2.0.

**Section 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. Sections may 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 section 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 section 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, and
- 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.); and
- 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:
  - 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.

○ 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.

○ 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.

○ 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 section 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.
**Section Marketing Calendar**

The CASBO state office provides the sections with an annual Section Marketing Calendar (casbo.org > Section Overview) of important timelines for marketing and promotion purposes. Consult this calendar for CASBO events; publication schedules; and suggested timelines for submitting important section information, such as rosters and meeting and event schedules, to the CASBO state office.

**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](http://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](http://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](http://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
Appendix

CASBO Section Bylaws

California Association of School Business Officials – (insert name of section)

Adopted by the Board of Directors of the California Association of School Business Officials on __________.

Article I – Name, Affiliation and Purpose

Section 1. Name of Section

The name of this section shall be the California Association of School Business Officials – (insert name of section), also known as the CASBO (insert name of section).

Section 2. Affiliation

The CASBO (insert name of section) is an integrated part of the California Association of School Business Officials, also known as CASBO. The CASBO (insert name of section) is under the control of the CASBO Board of Directors, and shall abide with all provisions of the Bylaws and policies of CASBO, as well as the decisions of the CASBO Board of Directors. The CASBO (insert name of section) shall take no action or approve any rule or policy that is inconsistent with or contrary to any law or regulation, or CASBO Articles of Incorporation, Bylaws, Manual of Procedures or action of the CASBO Board of Directors.

Section 3. Purpose

The purpose of the CASBO (insert name of section) shall be:

a) To support and promote the goals and objectives of CASBO as defined in the current, member-driven strategic plan.

b) To provide opportunities whereby individuals who work in the school business profession can meet about, discuss and study all phases of school business administration.

c) To support the improvement of schools in California, from the perspective of school business professionals, for the benefit of all students.

d) To assist in the effective and efficient operation of schools and school systems in California by facilitating the exchange of information and best practices among school business professionals about topics related to school business administration.

Article II – Membership

Section 1.

Membership in the CASBO (insert name of section) shall consist of those persons and entities whose membership is in good standing with CASBO and who reside or are employed within the boundaries of this section.

Article III – CASBO (insert name of section) Officers, Duties and Qualifications

Section 1. Officers

The officers of the CASBO (insert name of section) shall be President, President-Elect, Secretary, and Treasurer, each of whom shall also serve as members of the CASBO (insert name of section) Board of Directors.
Section 2. Election of CASBO (insert name of section) Officers

Once each year, a President-Elect, Secretary, and Treasurer shall be elected for a term of one year by the qualified section members, who are defined as the active Organizational employee members, Career Builder members and Honorary Life members of the insert name of section who are in good standing with CASBO. At the close of the term of the President-Elect, he or she shall advance to the position of President. Terms shall begin at the close of the annual conference of CASBO. A majority vote of qualified section members participating in the election shall be sufficient to elect a person to take office, provided that a quorum of a majority of qualified section members cast ballots in the election.

Section 3. Duties of CASBO (insert name of section) Officers

a) The President shall serve as chair of the section Board of Directors, preside at all section meetings, appoint members of section committees, serve as ex-officio member on all section committees, and generally ensure the successful operation of the section.

b) The President-Elect shall assume the duties of the President when the President is absent and assist the President in ensuring the successful operation of the section.

c) The Secretary shall keep official records and minutes of each meeting of the section Board of Directors and maintain other records of the section, including correspondence.

d) The Treasurer shall promptly collect and deposit all section funds, approve and pay section bills, maintain itemized records of all receipts and disbursements of section funds, prepare monthly statements for presentation to the section Board of Directors, prepare an annual budget for the section, assist state CASBO with an audit of section funds and other duties associated with the successful operation of the section. All officers are expected to develop, recruit and assist in retaining individual, organizational, and institutional memberships in CASBO.

Section 4. Qualifications of CASBO (insert name of section) Officers

Qualifications for the position of section President, President-Elect, Secretary, and Treasurer shall be as follows:

a) All officers shall be active Organizational employee members, Career Builder members or Honorary Life Members in good standing with the CASBO for a period not less than two years and not retired from school business.

b) All officers shall have at least one year of experience at the section or state level as a member of the Board of Directors, standing committee or professional council, or have exhibited active participation at the section or state level in other capacities.

c) All officers must live or work in the section at the time of their election.

Section 5. Vacancies

A vacancy shall be deemed to have occurred in one or more of the following instances:

a) An officer is no longer eligible for membership in CASBO.

b) An officer resigns his or her position

c) The CASBO insert name of section Board of Directors finds that the officer has abandoned the position by not attending two consecutive meetings of the Board or by failing to carry out the duties of the position.

d) An officer is removed from office by the CASBO Board of Directors.

Vacancies shall be filled by the CASBO insert name of section Board of Directors for the remainder of the officer’s term. In the case of the section President vacating his or her office, the President-Elect shall take office as President for the remainder of the original term and shall also serve the full term for which they were elected. The CASBO insert name of section Board of Directors shall then call for an election to fill the position of President-Elect to cover that same time period.

Article IV - CASBO (insert name of section) Board of Directors

Section 1. Composition

The Board of Directors shall consist of the four section officers, the immediate Past President, four Directors elected by section members, the member who is serving as the section director on the CASBO Board of Directors, and a non-voting liaison from the section’s Associate Membership who is appointed by the Section
President. Terms of board members shall be for a period of one year, except that the term of the section director who is serving on the CASBO Board of Directors will be for the duration of his or her term on the CASBO Board of Directors, and the term of the non-voting liaison from the section’s Associate Membership shall be for three years. Terms shall begin at the close of the annual conference of CASBO.

Section 2. Election of CASBO (insert name of section) Board of Directors

The four board members who are not officers of the section shall be elected annually by active Organizational employee members, Career Builder members and Honorary Life members of the section who are in good standing with CASBO. Provided that a quorum of a majority of the qualified section members cast ballots in an election, a majority vote of those members shall be sufficient to elect a person to the CASBO insert name of section Board of Directors.

Section 3. Duties of CASBO (insert name of section) Board of Directors

a) Meet regularly at the call of the section president.
b) Approve an annual budget for the section.
c) Approve all expenditures incurred by the section.
d) Approve an annual schedule of events for the section.
e) Assist the section president with the appointments to section committees and professional councils.
f) Assist with the general operation of the section, including individual assignments and tasks, arranging programs or meetings, developing communications with members, etc.
g) Select for the following term the Associate Member who will be a member of the Board of Directors.
h) Ratify section committee and professional council appointments made by the section president.
i) Fill vacancies as provided in these bylaws and the bylaws of CASBO.
j) Develop, recruit and assist in retaining active Organizational employee members, Career Builder members, and associate memberships in CASBO.
k) Ensure that a member election is held annually to elect section officers and every three years to elect a section director to the CASBO Board of Directors.

Section 4. Qualifications of CASBO (insert name of section) Board of Directors

Members of the CASBO insert name of section Board of Directors shall be active Organizational employee members, Career Builder members and Honorary Life Honorary Life Members in good standing with CASBO and not retired from school business. Associate members must also be in good standing with CASBO.

Section 5. CASBO (insert name of section) Board of Directors Rules of Order

(a) The standing authority for meetings of the CASBO insert name of section Board of Directors shall be Robert’s Rules of Order.
(b) A majority of the members of the CASBO insert name of section Board of Directors shall constitute a quorum sufficient for the transaction of business
(c) Decisions made by the CASBO insert name of section Board of Directors shall be made by a majority vote of those members present.

Section 6. Vacancies

A vacancy shall be deemed to have occurred on the CASBO insert name of section Board of Directors in one or more of the following instances:

(a) A member is no longer eligible for membership in CASBO.
(b) A member resigns his or her position
(c) The CASBO insert name of section Board of Directors finds that the member has abandoned the position by not attending two consecutive meetings of the Board.
(d) A member is removed by the CASBO Board of Directors.

Vacancies shall be filled by the CASBO insert name of section Board of Directors for the remainder of the member's term.

Article V - CASBO (insert name of section) Committees and Professional Councils

The CASBO (insert name of section) Board of Directors shall adopt a structure of standing committees, professional councils, and ad-hoc committees to ensure CASBO member involvement and input into the section and to CASBO on issues of interest to school business professionals.
Section 1. Qualifications of section committee and professional council members

Membership on section standing committees, professional councils, and ad-hoc committees, including chairs and assistant chairs, shall be reserved for individuals whose membership is in good standing with CASBO and who reside or are employed within the boundaries of this section.

Section 1.2 Section Professional Council Chair

The Section President will appoint the chairs of section professional councils. Part of each chair’s responsibilities will include serving as a section representative to the corresponding CASBO professional council. The term of each section professional council chair will be for three years.

The schedule of section professional council chair appointments will coincide with the need at the state level to ensure that no more than one-third of the members of state professional councils are appointed in the same year.

Section 1.5 Section Affiliations

CASBO members self-identify the section of which they are a member, which may be the section in which they live or work. Members may change their section affiliation annually within 30 days following their membership renewal date.

Section 2. Associate Members

Associate members are valuable partners in carrying out the mission of CASBO. The CASBO insert name of section will seek to involve associate members in the ongoing activities of the section, including participation on section committees and professional councils. The section board may seek the input of the state CASBO Associate Member Committee when considering associate member appointments to section-level committees and private sector involvement in CASBO events. The Section President may appoint an assistant liaison from the section’s Associate Membership, the term of which shall be for three years with the duties being specified by the section.

Article VI – General

CASBO is a member-driven professional organization. Non-members who are eligible for CASBO membership are encouraged to join CASBO in order to receive the benefits of membership. Nonmembers are not allowed to serve on committees or professional councils, or hold office or other leadership positions within CASBO or within this section. Non-members may be invited to attend.

**For more information on State MOP, the entire manual is available at the CASBO website**

Sample Section Job Descriptions

(Courtesy of the Shasta Cascade Section)

Section Board of Directors & Officers

President

- Serves as the Chairperson of the Executive Committee.
- Plans and presides at the Section Board of Directors meetings and is responsible for all Section activities.
- Prepares agendas and sends notices to the board members and others who should attend Section Board of Directors meetings.
- Handles the business of the Section between meetings by telephone and/or correspondence with all board members.
• Appoints and is responsible for Section committees and notifying elected officers of their respective appointments and duties.
• Serves as ex-officio member of all committees.
• Responsible for Section Fall Conference and Job-A-Like including the program.
• Provides the State Board of Directors with Section information; i.e., roster, calendar, annual report; update on activities, programs and fiscal matters, etc.
• Submits all expenses for the current year to the Treasurer by June 1.

President-Elect
• Serves as the Chairperson of the Governance Oversight Committee and a member of the Executive Standing Committees.
• Serves as board liaison with Section Professional Councils.
• Presides at Section Board of Directors meetings in the absence of the President.
• Maintains an updated record of manual of procedures adopted by the Section.
• Prepares a Directory of the Section for the following year with DRAFT presented at the annual organizational meeting.
• Attends Section Board of Directors’ meetings.
• Submits budget allocation requests for the subsequent year to the Treasurer.
• Performs other functions for the Section as assigned by the President or the Section Board of Directors.

Secretary
• Serves as a member of the Executive Standing Committee.
• Responsible for a complete and accurate record of minutes of the Section activities.
• Maintains records of membership, attendance and minutes of the Section Board of Directors meetings.
• Prepares minutes of the Section Board of Directors meetings in final form, signs and distributes minutes to all board members and handles official correspondence.
• Serves as custodian of all official/legal documents and contracts.
• Attends Section Board of Directors meetings.
• Performs other functions for the Section as assigned by the President or the Board of Directors.

Treasurer
• Maintains Section checking and savings accounts.
• Writes checks, makes deposits, and issues receipts for all money collected.
• Submits the proposed annual Section budget at the annual organizational meeting with the assistance of the President-Elect.
• Maintains records of all budgets, receipts and disbursements.
• Submits updated Treasurer’s report at Section Board of Directors meetings.
• Responsible for accounting of Section sponsored events:
  • Distributes invoices or refunds.
  • Pays outstanding bills.
  • Prepares various forms such as invoices and expense vouchers.
• Submits all expenses for the current year by June 1.
• Makes books and accounts ready for audit by July 1.
• Attends Section Board of Directors meetings.
• Performs other functions for the Section as assigned by the President or the Board of Directors.
**Director 1**
1. Serves as a member of the Governance Oversight Committee
2. Coordinator of the Annual Fall Conference:
   a. Mail general meeting notice and reservation requests, as applicable.
   b. Handle reservation requests.
   c. Makes a list of attendees.
   d. Notifies hotel of reservation numbers and meal count.
3. Attends Section Board of Directors meetings.
4. Submits all expenses for the current year to the Treasurer by June 1.
5. Performs other functions for the Section as assigned by the President or the Board of Directors.

**Director 2**
   a. Mail general meeting notice and reservation requests, as applicable.
   b. Handle reservation requests.
   c. Makes a list of attendees.
   d. Notifies hotel of reservation numbers and meal count.
2. Coordinates Professional Council activities for
   a. Chief Business Officials
   b. Financial Services
   c. Risk Management
3. Recommends by February 1 to the President-Elect the appointment of Professional Council chairs and assistant chairs for the following year.
4. Attends Section Board of Directors meetings.
5. Submits all expenses for the current year to the Treasurer by June 1.
6. Performs other functions for the Section as assigned by the President or the Board of Directors.

**Director 3**
1. Serves as the Chair of CASBO sponsored workshops.
2. Coordinates Professional Council activities for:
   a. Accounting
   b. Human Resources
   c. Payroll
3. Recommends by February 1 to the President-elect the appointment of Professional Council chairpersons and assistant chairpersons for the following year.
4. Attends Section Board of Directors meetings.
5. Submits all expenses for the current year to the Treasurer by June 1.
6. Performs other functions for the Section as assigned by the President or the Board of Directors.

**Director 4**
1. Serves as Chair of the Section Awards Committee.
2. Responsible for website and communication.
3. Coordinates Professional Council activities for:
   a) Child Nutrition Facilities
   b) Maintenance & Operations
   c) Purchasing
4. Recommends by February 1 to the President-elect the appointment of committee chairpersons and assistant chairpersons for the following year.
5. Attends Section Board of Directors meetings.
6. Submits all expenses for the current year to the Treasurer by June 1.
7. Performs other functions for the Section as assigned by the President or the Board of Directors.

**Director 5**
1. Serves as the Chair of Section Membership Committee.
2. Coordinates Professional Council activities for:
   a) Transportation
   b) Technology
   c) Retirees
3. Recommends by February 1 to the President-elect the appointment of Professional Council chairpersons and assistant chairpersons for the following year.
4. Attends Section Board of Directors meetings.
5. Submits all expenses for the current year to the Treasurer by June 1.
6. Performs other functions for the Section as assigned by the President or the Board of Directors.
7. Coordinates County Liaisons.

**Immediate Past President**
1. Serves as a member of the Executive and Nominating/Election Committees.
2. Serves as a consultant to the President and Board of Directors.
3. Attends Board of Directors meetings.
4. Assists the President upon request.

**Associate Member Liaison**
As a non-voting member on the Board of Directors, the Associate Member Liaison shall;
1. Serve as a liaison, providing a vital communication link between the Board of Directors and the Associate Member Committee and associate members in general.
2. Bring information and perspectives from the associate members, but act as a member of the Board and overall association.
3. Attends Board of Directors meetings.
4. Assists the President upon request.

**Professional Councils**
- Each committee will plan and successfully complete at least one project.
- Each committee will be responsible for at least one presentation at the Annual Fall Conference.

**Professional Council Chairs**
- The term of each Section Professional Council Chair will be for three years.
- Recruits, organizes and directs the activity of Section Professional Council.
- Presents committee program report at Board of Directors meetings.
- Each committee Chair will recruit a full roster of members including an Assistant Chair ready to assume the responsibility as Chair when appropriate.
- Committee Chair will support the Shasta Cascade Section by regularly attending Section board meetings. In the event, it is not possible for the Chair to attend, the Assistant Chair will represent the committee.
- Coordinates workshops as approved by the Section Board of Directors.
- Coordinates Section committee activities with the State Professional Council.
- Attends State Professional Council meetings.
- Submits all expenses for the current year to the Treasurer by June 1.
Dear Joyce,

Are you interested in becoming more involved in your section leadership? CASBO’s Central Section is looking for individuals who want to benefit their careers by improving their leadership skills and networking capabilities. If this sounds like you, please consider applying for a leadership position for the 2019-20 fiscal year!

We have Director IV and treasurer positions open on our board; and professional council chair openings for Accounting, CBO, Child Nutrition, Facilities, Maintenance & Operations, and Risk Management. You must be a CASBO Central Section individual member* to be eligible for these positions.

To learn more about the responsibilities involved in serving, please consult CASBO’s Central Section Manual of Operating Procedures, or contact a member who served in 2018-19. Both of these resources can provide you with specifics of the positions, as well as the benefits that leadership service can provide both you and your district.

If this sounds right for you, please complete the application, and send it to me no later than March 29, 2019.

If you have any questions about the leadership appointments process, please contact me. Good luck, everyone!

Sincerely,

Grant Schimelpfening
CASBO Central Section President
Chief Business Official, Lindsay USD
371 E. Hermosa St. | Lindsay, CA 93247
Telephone: (559) 562-5111 ext. 5113
Email: gschimelpfening@lindsay.k12.ca.us

*For purposes of eligibility, "a CASBO Central Section individual member" is a current Organizational Subscription Employee Member, Career Builder Member, Honorary Life Member or Retiree Member located within the Central region.
# CASBO CENTRAL SECTION
## DIRECTOR AND PROFESSIONAL COUNCIL CHAIR APPLICATION

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<th>Applicant Name</th>
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<td>Title</td>
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<td>Employed By</td>
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<td>Class Code, if County Office</td>
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<td>Phone Number</td>
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<td>Member Number</td>
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<tr>
<td>No. Years a CASBO Member</td>
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**Director or Committee Chair Position of interest, please check box**

- Director IV [ ]
- Treasurer [ ]
- Professional Council – Child Nutrition [ ]
- Professional Council – Accounting [ ]
- Professional Council – Facilities [ ]
- Professional Council – CBO [ ]
- Professional Council – M&O [ ]
- Professional Council – Risk Management [ ]

**Please list job positions held.**

<table>
<thead>
<tr>
<th>Position</th>
<th>LEA or Company</th>
<th>No. of Years</th>
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**Briefly describe why you want to be a member on the committee(s)/position you indicated.**

**Please list all activities you have been involved in during your career that qualify you to apply for this position. Include such items as serving on CASBO section boards, Professional Councils, other committees, and committees and boards outside of CASBO. Please also indicate the various positions you have held while serving on any committees. Use additional paper if necessary.**

**Is a copy of your resume attached? Please check box**

- Yes [ ]
- No [ ]

**Signature** | **Date**

---

Please submit applications by *March 29, 2019*, to Grant Schimpelpfening at gschimelpfening@lindsay.k12.ca.us.
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 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 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. Once received, the CASBO Nominations & Elections Committee will review and present your application to the CASBO officers charged with making the appointments.

1For 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).

2All 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
California Association of School Business Officials

2018-19 Federal Legislative Agenda

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.
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).
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

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)
2019-20 Board Meeting Submission Deadlines and Agenda Schedule

2019-20 Section Deadlines

State Director Board Reports Due: September 30, 2019
Deadline to Submit Section Awards: December 31, 2019
State Director Board Reports Due: January 6, 2020
Applications for State Leadership Appointments (PCs & Committees) Due: February 14, 2020
State Director Board Reports Due: March 9, 2020
Section Rosters Due: May 15, 2020
Section Annual Meetings & Events Calendars Due: May 15, 2020
Section Approvals for Proposed State Leadership Appointments (PCs only) Due: May 15, 2020
State Director Board Reports Due: May 18, 2020

2019-20 Board Meeting Agenda Schedule

<table>
<thead>
<tr>
<th>Board Meeting Date</th>
<th>October 19, 2019</th>
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<tbody>
<tr>
<td>Minutes Review</td>
<td>September 16, 2019</td>
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<tr>
<td>Agenda Items Review</td>
<td>September 23, 2019</td>
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<td>Agenda Reports Due</td>
<td>September 30, 2019</td>
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<td>Final Agenda Packet Review</td>
<td>October 9, 2019</td>
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<th>January 25, 2020</th>
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<tr>
<td>Minutes Review</td>
<td>December 10, 2019</td>
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<td>Agenda Items Review</td>
<td>December 16, 2019</td>
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<td>Agenda Reports Due</td>
<td>January 6, 2020</td>
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<tr>
<td>Final Agenda Packet Review</td>
<td>January 15, 2020</td>
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<td>Minutes Review</td>
<td>February 24, 2020</td>
</tr>
<tr>
<td>Agenda Items Review</td>
<td>March 2, 2020</td>
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<tr>
<td>Agenda Reports Due</td>
<td>March 9, 2020</td>
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<tr>
<td>Final Agenda Packet Review</td>
<td>March 18, 2020</td>
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<tbody>
<tr>
<td>Minutes Review</td>
<td>April 27, 2020</td>
</tr>
<tr>
<td>Agenda Items Review</td>
<td>May 4, 2020</td>
</tr>
<tr>
<td>Agenda Reports Due</td>
<td>May 18, 2020</td>
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<tr>
<td>Final Agenda Packet Review</td>
<td>May 27, 2020</td>
</tr>
<tr>
<td>Agenda Packet Available in Board Effects</td>
<td>May 29, 2020</td>
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To: Christina Aguilar, President  
From: Paul Ziegler, Shasta Cascade Section State Director  
Regarding: Board Report  
Date: June 9, 2018

Shasta Cascade’s year is in full swing under the leadership of President Jenny Bickley, with some new faces in some of the Officer and Director positions. There are also some key positions that have yet to be filled, including those of the President Elect and Director I. There has been progress filling the outstanding Professional Council slots, with just four slots remaining open at this time.

The section is busy planning its professional development and training schedule for the year. Confirmed workshops include “Budget Basics and Beyond” which will be held in Eureka on September 25th, and “Accounts Payable – How to Pay the Bills” in Redding on October 30th. Other workshops are in the queue but do not yet have scheduled dates.

The Fall Conference will be held on October 18th at the Gaia Hotel and Spa in Anderson. Section leadership is working on speakers, topics, and format for the event, with featured speakers Bill McGuire and Nina Boyd already in place.

The Holiday Workshop is scheduled for November 30th in Redding, while Professional Collaboration Workshops are tentatively booked for March 20, 2019, in Eureka, and March 22, 2019, in Redding.

Increasing membership remains one of the section’s goals going into the new year. Now that the initial rush of new CASBO members has settled a bit, we are expecting to work with updated lists and reach out to districts that have not yet joined the organization. This is seen as a way of invigorating existing members and increasing participation at the section level, as well.

Lastly, the section is hoping to be well represented at the Leadership Forum in July. Recent discussion has the section officers and directors determining who will be able to attend the upcoming event.
June 20, 2018

Dear Colleagues,

On June 8 and 9, 2018, the CASBO Board of Directors held its annual one-day leadership event followed by its June board meeting. The meeting was held in Monterey, and I was pleased to participate and represent our section.

If you are new to CASBO, the members of our Board of Directors and Education Advocacy Foundation (EAF) meet four times a year: in June, October or November, January, and April. Board officers serve as an executive committee and meet monthly on CASBO business.

It is my honor to serve as a member of the board and play a role in the wonderful growth and development of our association. I want to keep you informed of the governance of the association by taking a moment to share some information about the recent meeting and encourage your participation in some important CASBO initiatives.

The biggest news for CASBO continues to be our growth. As of this communication, we have over 23,500 members representing more than 600 school districts! This is wonderful news because it means we can serve even more school business operations professionals, providing them with needed professional development and legislative advocacy services. It also means that there are more opportunities for member involvement, especially in state, section and professional council activities.

The CASBO 2018 Annual Conference & California School Business Expo was a success. As you may know, it is our premier professional development event. This year, we welcomed over 1,500 practitioners — 340 of whom were first-time attendees! — and 1,100 guests to Sacramento. We offered these participants more than 160 workshops, two outstanding general sessions, our annual economic summit, a sold-out expo, and a variety of networking and social events. If you could not attend this year, please consider it for next year.

Plans for our 2019 Annual Conference & California School Business Expo at the San Diego Convention Center are underway. The Annual Conference Committee and Annual Conference Volunteer Task Force are meeting soon to plan the event. There will be a limited number of scholarships available, so please watch your email for announcements about them in late 2018; and mark your calendar for April 15-18, 2019. Registration and other program materials will be available later this fall.

We also encourage your participation in a variety of CASBO leadership groups, including our new Charter Schools and Special Education Professional Councils, and our existing Leadership Development, Membership, and Communications & Marketing Committees. Please continue to read our bi-monthly newsletter for information about these and other ways you can serve; and if you’re interested in representing your section, complete and submit the Form 16 Application for Appointment. (You may also contact Michelle Neto, our Director of Governance & Leadership, at (916) 504-2254 or mneto@casbo.org for additional information.) Remember, your transportation and expenses are paid, and these opportunities give you contacts, insights and methods to improve your career and professional skills!

The first day of our June meeting was dedicated to building our team and enhancing our leadership of CASBO. Our program was facilitated by CASBO Past President Pearl Iizuka, who serves as a governance trainer for the board. We heard reports from CEO & Executive Director Molly McGee Hewitt, who reviewed our processes and protocols and discussed strategic planning; and from Deputy Executive Director & Chief Strategy Officer Tatia Davenport, who shared insights into the changing face of CASBO and how we can maximize our services to our members. We also had time to get to know each other better and share our stories, challenges and successes.
On the second day, we held our formal board meeting, which included customary updates from our professional staff and member leaders on topics such as the budget, professional development and legislative advocacy activities, and certifications. We heard reports from our officers, section directors, and professional council and committee chairs; approved committee appointments and our 2018-19 budget; formalized our processes and protocols, including those for the formal evaluation of our CEO & Executive Director; and established our board committee structure. We also discussed plans for the upcoming 2018 Executive Leadership Forum and our 2019 Annual Conference.

Assistant Executive Director for Governmental Relations Sara Bachez and Legislative Chair La Tanya Kirk-Carter presented a briefing on the budget and current legislation. I am pleased to report that CASBO continues to achieve or exceed our program and financial expectations, and we will end the 2017-18 fiscal year meeting our budget obligations and with a profit.

Our new board meeting process allows us to use our time to direct our attention to discussions with a more strategic focus. These discussions are intense and allow us to spend significant quality time discussing major issues and upcoming projects. Tatia Davenport led our strategic discussion at this meeting, and we explored methods for CASBO to assist its sections and professional councils in better serving our members.

As your section director, my goal is to represent you and keep you informed of the leadership actions and activities of CASBO’s Board of Directors and EAF. If you have any questions or information you would like to share before our next board meeting on October 27, 2018, in Sacramento, please contact me.

CASBO staff is also available to answer your questions or provide you with additional information. You may contact Molly McGee Hewitt at (916) 504-2246 or molly@casbo.org at any time.

Thank you for your membership and participation in CASBO!

Sincerely,

Richard G. De Nava
State Director
Eastern Section
ROBERT “BOB” REEVES SCHOLARSHIP

History

CASBO’s Associate Member Committee pays tribute to Robert E. “Bob” Reeves, longtime CASBO treasurer and ardent supporter of the Friends of Education Scholarship Fund, who passed away August 30, 2006, in Glendale, California. He was 89.

“Bob was a legend,” says his friend Ira Carter, a CASBO past president who worked with Dr. Reeves for many years. “He was totally dedicated to CASBO and to all the things we stood for in terms of self-improvement and being the best at whatever we are in life.”

Echoes another past president, Pat Gibbons: “He was just an extremely honest person.”

With integrity in business and enthusiasm for school business, Dr. Reeves served as CASBO treasurer for 12 years, amid a career spanning five decades. He retired as director of fiscal services for the Orange County Department of Education in 1989 at the age of 72, after serving in several Orange County school districts around his Glendale home, where he and his wife Beulah lived for 50 years.

“I thought he was never going to quit,” says Beulah. They met as teachers in Iowa and moved to California, where Dr. Reeves first taught college accounting courses before earning his doctorate in 1955 at the University of Southern California.

Dr. Reeves was devoted to CASBO’s Annual Conference & California School Business Expo, having missed only one annual event in 43 years. As a result of his ongoing support and close professional association with many CASBO presidents, he was one of just a few CASBO officers to be invited to the annual past president events at conference.

In 1989, Dr. Reeves received the Sky Joyner Award, presented by the Associate Member Committee in recognition of school business leaders who demonstrate outstanding skill, ability and service to their communities and professions.

In addition to his wife of 64 years, Dr. Reeves is survived by three daughters, two sons, nine grandchildren and seven great-grandchildren.

The Robert “Bob” Reeves Scholarship honors his memory by promoting continuing education and training for CASBO members. Any CASBO section with an active Associate Member Committee Liaison may award a $1,000 scholarship to a deserving professional each year.
ROBERT “BOB” REEVES SCHOLARSHIP
Fact Sheet

Scholarship Title: The Robert “Bob” Reeves Scholarship

Scholarship Amount: $1,000

Scholarship Sponsor: Associate Member Committee (“AMC”)

Who is eligible? One active CASBO member from each section that has an active AMC Liaison every year. The applicant must meet one (1) of the following requirements in order to apply:

• Must be an active CASBO member enrolled in an education program which will lead to or promote progress within a school business profession as a CBO or other School Business Professional at the elementary, secondary or community college levels; or

• Must be an active CASBO member who is employed in the education field who desires to expand his/her knowledge related to a school business profession as a CBO or other School Business Professional; or

• Must be an active CASBO member who is a post-graduate candidate in a school business profession at a college or university in support of CBO or other School Business Professional training.

Who selects the scholarship recipients from each section? Each section board solicits its own applicants and selects its own winner.

How do I apply? Interested applicants must complete the form provided by the AMC (included in this application package).

What is the timeline for awarding the scholarships?

✓ Sections may solicit applicants from July 1 to September 30, or an earlier date set by their section board.

✓ Each section board reviews its own applicants and selects its scholarship winner by November 15, or by an earlier date set by the section board. Section boards should give preference to those applicants who are pursuing formal education or professional certifications.
Each section board then provides a copy of its winning application to its respective section AMC Liaison, who in turn forwards it to CASBO and the AMC.

Once the AMC approves the winning applications, it will notify CASBO, and CASBO staff then will issue checks payable to the scholarship recipients and provide them to each section president, or to each section’s AMC Liaison.

Scholarship checks should be presented to the scholarship winners at a section or other appropriate CASBO event no later than December 31 each year.

CASBO and the AMC will announce the scholarship winners in CASBO publications and at the CASBO Annual Conference & California School Business Expo.

What if an applicant is not selected during the prescribed timeline? Scholarship funds are available during the prescribed period of each CASBO fiscal year. If the timeline is not followed, the scholarship is not awarded and the funds are lost. There is no rollover of scholarships from year to year.

How often can a person apply for a scholarship? Interested applicants may apply each year. Scholarship recipients are prohibited from applying for an additional scholarship for five years from the date of their previous selection.

Can a section award more than one scholarship? It is the intention of the AMC that a single scholarship in the amount of $1,000 be awarded each year.

Can section board members apply for the scholarship? Yes, section board members are eligible but must not be present at or participate in the selection process.

How can a section determine if an applicant is an active CASBO member? CASBO staff will provide verification of membership when requested.

What if a scholarship winner does not use the scholarship funds? If a scholarship winner fails to use the scholarship funds as directed, he/she can face additional taxes and scrutiny by the IRS. The scholarship funds could be considered additional income if not used as intended. Scholarships are awarded on an honor system; and a written confirmation is included in the application stating that, if awarded a scholarship, the applicant promises to use the funds for the program for which the scholarship was awarded. Recipients should keep documentation of their use of scholarship funds for IRS review.
ROBERT “BOB” REEVES SCHOLARSHIP
Applicant Checklist

o Obtain relevant documents:
  ü Scholarship History
  ü Scholarship Fact Sheet
  ü Scholarship Application

o Check that you meet the pre-requisites for eligibility (as listed in the Fact Sheet). You must be an active CASBO member:

  • Whose section has an active Associate Member Committee Liaison;
  • Who has not received this scholarship within the past five (5) years; AND
  • Who meets one (1) of the following requirements:

    ➢ Must be enrolled in an education program which will lead to or promote progress within a school business profession as a CBO or other School Business Professional at the elementary, secondary or community college levels; or
    ➢ Must be employed in the education field with a desire to expand your knowledge related to a school business profession as a CBO or other School Business Professional; or
    ➢ Must be a post-graduate candidate in a school business profession at a college or university in support of CBO or other School Business Professional training.

*Note: Preference will be given to those applicants pursuing formal education or professional certifications.*

o Obtain three (3) professional references (name, title, employer, phone number and email address).

o Complete all sections of the application.

o Send completed application and professional references to your designated section contact (as indicated on the application form) no later than September 30, or an earlier date if so designated by your section board.
ROBERT “BOB” REEVES SCHOLARSHIP
Application

(Please complete the application in its entirety. You may attach your resume, but it may not be substituted in place of a completed application. Failure to complete this application will result in disqualification.)

1. NAME: ________________________________________________________________

2. CONTACT INFORMATION:
   Address: Home __________________________________________________________
   Work _____________________________________________________________
   Phone: Home (___) ____________ Work (___) ____________
   Email: Personal ____________ Work ____________________________________

3. EMPLOYMENT HISTORY (list all positions held within the past five years, beginning with your most current position):
   a. Title ______________________________________________________________
      District/Organization _______________________________________________
      Years (mm/yyyy to mm/yyyy) ________________________________
   b. Title ______________________________________________________________
      District/Organization _______________________________________________
      Years (mm/yyyy to mm/yyyy) ________________________________
   c. Title ______________________________________________________________
      District/Organization _______________________________________________
      Years (mm/yyyy to mm/yyyy) ________________________________
   d. Title ______________________________________________________________
      District/Organization _______________________________________________
      Years (mm/yyyy to mm/yyyy) ________________________________
4. **PROPOSED USE OF SCHOLARSHIP FUNDS** (complete one of the following):
   
a. Educational Degree Level _____________________________________________
   
   Location and Dates ______________________________________________________
   
b. Professional Development/Certification _________________________________
   
   Organization __________________________________________________________
   
c. Internship ____________________________________________________________
   
   District/Organization ____________________________________________________
   
d. Research Study _______________________________________________________
   
5. **DESCRIBE YOUR EDUCATIONAL, PROFESSIONAL DEVELOPMENT/CERTIFICATION, INTERNSHIP OR RESEARCH STUDY PLANS IN DETAIL:**

   STATE YOUR ULTIMATE EDUCATIONAL GOAL OR OUTCOME:
6. DESCRIBE YOUR PROFESSIONAL GOALS:

7. CASBO MEMBERSHIP DETAILS:
   a. Member since ______________________
   b. Section __________________________
   c. List any voluntary leadership experience/activities with CASBO and the dates you performed them:
8. OTHER PROFESSIONAL ORGANIZATION EXPERIENCE:

a. Name ________________________________________________
   Member since ____________________

b. Name ________________________________________________
   Member since ____________________

c. Name ________________________________________________
   Member since ____________________

d. Name ________________________________________________
   Member since ____________________

LIST ANY VOLUNTARY LEADERSHIP EXPERIENCE/ACTIVITIES WITH OTHER ORGANIZATIONS AND THE DATES YOU PERFORMED THEM:
9. **PROFESSIONAL REFERENCES:**

a. Name ____________________________________________
   Title ____________________________________________
   Employer __________________________________________
   Phone (____) ___________   Email ______________________

b. Name ____________________________________________
   Title ____________________________________________
   Employer __________________________________________
   Phone (____) ___________   Email ______________________

c. Name ____________________________________________
   Title ____________________________________________
   Employer __________________________________________
   Phone (____) ___________   Email ______________________

10. **SUBMISSION INSTRUCTIONS:**

    Please submit your completed scholarship application to your section president no later than the application deadline specified below.

    To find your section president:

    • Visit casbo.org > Sections
    • Click on your section name
    • Under “Leadership,” click on “Board of Directors”

**APPLICATION DEADLINE:**

*September 30, 2019*
ROBERT “BOB” REEVES SCHOLARSHIP
Associate Member Committee Liaison Checklist

- At the earliest meeting following the CASBO Annual Conference, **review the information and protocols** for the Robert “Bob” Reeves Scholarship.

- Working with your section board, set your scholarship calendar for solicitation, review, selection and announcement deadlines:* 
  - No later than July 1: Begin applicant solicitation.
  - No later than September 30: Application deadline.
  - No later than November 15: Select the winner.
  - No later than December 31: Announce the winner at a section event.

- Working with your section board, determine how your section will advertise scholarship availability. It is recommended that you:
  - Send at least one email blast to all section members about the scholarship.
  - Include scholarship information in section event advertisements.
  - Announce the scholarship at section events and meetings.

- Verify that scholarship availability to section members has been communicated in accordance with these and any other recommendations as set by your section board.

- Working with your section board, select a board member to receive applications and determine the selection process in accordance with your scholarship calendar. **Note:** Preference should be given to those applicants who are pursuing formal education or professional certifications.

- Work with the selected board member to monitor applications received.

- Work with your section board to:
  - Accept the winning application and provide it to the AMC for approval.
  - Send acknowledgment letters to the applicants not selected and encourage them to apply again next year.
  - Follow up with the AMC to confirm it has notified CASBO of the winner and requested the scholarship check.
  - Inform the winner.
  - Announce the winner and present the scholarship check at a section event.
  - Follow up with the AMC and CASBO to confirm that the winner is announced at Annual Conference.
  - Follow up with your section board to confirm that they have provided the winner’s name to Joyce Tribbey, CASBO Communications Coordinator, for announcement in CASBO publications and on the CASBO website.

* Deadlines may be set for an earlier date as approved by your section board.*
ROBERT “BOB” REEVES SCHOLARSHIP
Section Board of Directors Checklist

- At the earliest meeting following the CASBO Annual Conference, review the information and protocols for the Robert “Bob” Reeves Scholarship.

- Determine your section’s eligibility to participate: scholarships are available only in sections with an active Associate Member Committee liaison.

- Working with your section liaison, set your scholarship calendar for solicitation, review, selection and announcement deadlines:*  
  ✓ No later than July 1: Begin applicant solicitation.  
  ✓ No later than September 30: Application deadline.  
  ✓ No later than November 15: Select the winner.  
  ✓ No later than December 31: Announce the winner at a section event.

- Working with your liaison, determine how your section will advertise scholarship availability. It is recommended that you:  
  ✓ Send at least one email blast to all section members about the scholarship.  
  ✓ Include scholarship information in section event advertisements.  
  ✓ Announce the scholarship at section events and meetings.

- Select a board member to receive applications and determine the selection process in accordance with your scholarship calendar. Note: Preference should be given to those applicants who are pursuing formal education or professional certifications.

- Inform your section liaison of your selection.

- Work with your section liaison to:  
  ✓ Provide the winning application to the AMC for approval.  
  ✓ Follow up with the AMC to confirm it has notified CASBO of the winner and requested the scholarship check.  
  ✓ Inform the winner.  
  ✓ Announce the winner and present the scholarship check at a section event.  
  ✓ Follow up with the AMC and CASBO to confirm that the winner is announced in CASBO publications and at Annual Conference.  
  ✓ Provide the winner’s name to Joyce Tribbey, CASBO Communications Coordinator, for announcement in CASBO publications and on the CASBO website.

* Deadlines may be set for an earlier date as approved by your section board.
ROBERT “BOB” REEVES SCHOLARSHIP
Sample Emails to Individual Applicants

Application confirmation:

Subject Line: Robert “Bob” Reeves Scholarship Application Confirmation

We have received your application for the CASBO _[section name]_ Section Robert “Bob” Reeves Scholarship. We will review your application and notify you by email on or before November 15 whether or not you have been chosen as the scholarship winner.

Thank you for submitting an application for this scholarship. We value your participation as a CASBO _[section name]_ Section member.

Winner notification:

Subject Line: You’ve won the Robert “Bob” Reeves Scholarship!

Congratulations! The CASBO _[section name]_ Section has selected you as this year’s recipient of the Robert “Bob” Reeves Scholarship! We will be in touch very soon to make arrangements to present you with your scholarship funds.

Thank you for submitting your application for this scholarship. We’re so pleased to be able to assist you in your continuing professional development and proud to have you as a section member!

Unsuccessful applicant notification:

Subject Line: Robert “Bob” Reeves Scholarship Application Results

Thank you for applying for the CASBO _[section name]_ Section Robert “Bob” Reeves Scholarship. We regret to inform you that your application was not chosen this year.

We receive many deserving applications for this scholarship and, unfortunately, must limit our selection to one winner per section per year. Although you were not chosen this time, we encourage and invite you to try again next year.

Please accept our regrets, as well as our gratitude for your interest in this scholarship and, more importantly, for your valued participation as a CASBO _[section name]_ Section member.
CASBO Associate Membership

Build strong relationships … join the network today!
casbo.org
ASSOCIATE MEMBERSHIP - $1,500 ANNUALLY

As a year-round CASBO associate member, your company gets unprecedented access to California’s largest network of school business professionals. Now, we’re shining an even brighter spotlight on our associate members with new, upgraded benefits …

And we’ve flattened our price to one, affordable rate for increased visibility in our membership of 24,000 school business decision makers and staff, all of whom are available for you to build strong relationships with!

BENEFITS

Unlimited enrollment of your company employees, who will receive:
- Our bi-monthly newsletter, “California School Business News”
- Our twice-yearly newsletter, “CASBO Associate Member News”
- Access to our searchable online membership directory
- Ability to serve on CASBO committees and professional councils
- Ability to participate in the CASBO Associate Member Committee Speakers Bureau

A designated company primary contact, who will receive:
- All of the above, plus
- Our advocacy newsletter, “CASBO NewsBreak”

Three (3) copies of our quarterly print magazine, “California School Business,” delivered to your main office

Two (2) complimentary registrations to our annual Associate Member Academy (a $1,000 value)

A complimentary company listing in our online Buyer’s Guide

A $500 discount on your Annual Conference booth, with the opportunity to:
- Sign up for next year’s booth before non-members
- Purchase additional Annual Conference Expo badges at the member-discounted rate

Eligibility to participate as a sponsor at CASBO events

Opportunities to submit presentation content for state and regional professional development workshops (including Annual Conference sessions)

Opportunities to submit article content in CASBO publications

Member-discounted advertising in CASBO publications

Stay current on school news and get regular updates on legislation & advocacy efforts.

“Membership in CASBO is critical if you want to be a serious player in the K-12 education industry in California. Opportunities to participate and showcase your company are everywhere.”

Jeff Kaulig, CPA, CIE, Partner, Nigro & Nigro, PC

“Being a CASBO associate member has provided opportunities and access that we would not otherwise have. Sehi Computer Products is proud to be a part of the CASBO organization.”

Celeste Campbell, Sales Associate/Trade Show Coordinator, Sehi Computer Products, Inc.

“CASBO played a large role in getting my career up and running. Being an active member presented me with opportunities that allowed me to grow as a professional as well as build and strengthen relationships I will have for decades to come.”

Kathleen Neff, LEED AP, Account Executive, Schneider Electric

Membership pricing begins July 1 and is on a fiscal-year cycle from July 1 to June 30.
Become a year-round CASBO associate member to shine a spotlight on your company … and open the door to California’s largest network of school business professionals!

To learn more about Associate Membership, contact:

Membership Services
membership@casbo.org
(916) 447-3783

Reserve your exhibit space today: (775) 392.3065 | expo@casbo.org

Visit casbo.org > Learn > Events > Annual Conference to learn more.

CASBO ANNUAL CONFERENCE & CALIFORNIA SCHOOL BUSINESS EXPO

BY THE NUMBERS

70% of attendees decide or influence purchasing
1,500+ Attendees
150+ Workshops & Presentations

PURCHASING POWER

20% CBOS/ Superintendents
32% Directors/School Board Members
18% Managers/Supervisors
30% Other

Final Decision 20%
Strongly Influence 32%
Provide Input 18%
Do Not Influence 30%

BUSINESS DISCIPLINES

16% Accounting
20% CBOS/Superintendent
3% Child Nutrition
4% Facilities
10% Financial Services
3% Human Resources
3% Maintenance & Operations

23% Other
20% Payroll
7% Purchasing
3% Risk Management
2% Technology
3% Transportation
CASBO Partnership Program

Become a trusted advisor … join the network today!
casbo.org
PREMIER PARTNERSHIP - $15,000 ANNUALLY

Select a robust package of marketing and advertising opportunities to promote your company’s services and engage with school business professionals.

**BENEFITS**

**Exclusive opportunities to:**
- Present CASBO-promoted educational content and webinars to our community of 17,000+ customers
- Present workshops at the CASBO Annual Conference
- Submit professional development articles to CASBO publications
- Participate in the CASBO Affinity Program

**First rights** to:
- Selection of CASBO annual event sponsorships
- Selection of CASBO Annual Conference booth space
- Credit for one regular in-line 10’x10’ exhibit space

Year-long visibility and recognition at CASBO statewide events and on the CASBO website

**Exclusive use of the CASBO Premier Partner brand indicia**

“By invitation only” access to two CASBO Annual Conference events:
- President’s Leadership Recognition Dinner to honor the year’s outstanding leaders (two invitations)
- Partners Meeting to receive program updates and advisories, connect with CASBO partners and key staff, and collaborate on ways to enhance the partnership experience

Advertisements in CASBO publications:
- Full-page color ad in our “Annual Conference Program Guide”
- Half-page color ad in one issue of “California School Business” (quarterly magazine)
- Block color ad in two consecutive issues (one-month period) of “California School Business News” (bi-monthly newsletter)
- Web-brick color ad for three consecutive months on our website
- Web-banner white ad year-round on our website
- Enhanced listing and “Featured Company” status in our online Buyers Guide

Nine individual memberships with opportunities to participate on CASBO committees and access to CASBO publications

CASBO partners serve as thought leaders for our members by sharing valuable information that promotes their professional development. As a trusted adviser, your company receives exclusive and first rights to promotional opportunities to ensure that your message reaches our members directly.

“CASBO’s program is integral to our success. It’s more than just networking – it allows us to forge long-lasting relationships to collectively provide support to our schools and communities.”

BRENT STICKLER, VICE PRESIDENT, SOUTHWEST SCHOOL & OFFICE SUPPLY
PREMIER PLUS PARTNERSHIP - $35,000 ANNUALLY

Select the full package of marketing and advertising opportunities to give your company high-level access to the CASBO network of school business professionals.

BENEFITS

Exclusive opportunities to:
- Present CASBO-promoted educational content and webinars to our community of 17,000+ customers
- Present workshops at the CASBO Annual Conference
- Submit professional development articles to CASBO publications
- Participate in the CASBO Affinity Program

First rights* to:
- Selection of CASBO annual event sponsorships
  - $10,000 event allowance
- Selection of CASBO Annual Conference booth space
- Credit for one premium in-line 10’x10’ exhibit space

Year-long visibility and recognition at CASBO statewide events and on the CASBO website

Exclusive use of the CASBO Premier Plus Partner brand indicia

“By invitation only” access to two CASBO Annual Conference events:
- President’s Leadership Recognition Dinner to honor the year’s outstanding leaders (four invitations)
- Partners Meeting to receive program updates and advisories, connect with CASBO partners and key staff, and collaborate on ways to enhance the partnership experience

Advertisements in CASBO publications:
- Full-page color ad in our “Annual Conference Program Guide”
- Half-page color ad in four issues of “California School Business” (quarterly magazine)
- Block color ad in two consecutive issues (one-month period) of “California School Business News” (bi-monthly newsletter)
- Web-brick color ad for 12 consecutive months on our website
- Web-banner white ad year-round on our website
- Enhanced listing and “Featured Company” status in our online Buyers Guide

Thirteen individual memberships with opportunities to participate on CASBO committees and access to CASBO publications

* First rights occur as follows:
  Strategic Alliance Partners: before Premier Plus Partners
  Premier Plus Partners: after Strategic Alliance Partners
  Premier Partners: after Premier Plus Partners
  and before Associate Members
Become a year-round CASBO partner to play a critical role within our school business network ... and build strong, lasting relationships with California’s K-14 decision makers!

To learn more about our Partnership Program, contact:

Tatia Davenport  
Deputy Executive Director & Chief Strategy Officer  
tdavenport@casbo.org  
(916) 447.3783, ext. 2249

Tricia Meister  
Partnerships & Sponsorships Manager  
tmeister@casbo.org  
(916) 447.3783, ext. 2253

“Our philosophy, ‘an educated client is the best client,’ syncs perfectly with CASBO’s program, which provides us multiple opportunities to deliver relevant, practical information and advice to school leadership.”

RICK BROWN, PH.D., PRESIDENT, TERRAVERDE ENERGY

BY THE NUMBERS

70% of attendees decide or influence purchasing  
1,500+ Attendees  
150+ Workshops & Presentations

PURCHASING POWER

Final Decision 20%  
Strongly Influence 32%  
Provide Input 18%  
Do Not Influence 30%

Table: Business Disciplines

- Accounting 16%  
- CBO/Superintendent 20%  
- Child Nutrition 3%  
- Facilities 4%  
- Financial Services 10%  
- Human Resources 3%  
- Maintenance & Operations 3%  
- Other 23%  
- Payroll 3%  
- Purchasing 7%  
- Risk Management 3%  
- Technology 2%  
- Transportation 3%

Reserve your exhibit space today: (775) 392.3065 | expo@casbo.org  
Visit casbo.org > Learn > Events > Annual Conference to learn more.
Section Meeting Agenda Template

(Name of Section)

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

Officers: (Names)
Members: (Names)

CASBO STAFF: (CASBO Staff)

Invited Guests: Optional

AGENDA

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 Section Roster with all contact information

Attach MINUTES from previous meeting

✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿ ✿
Section Meeting Minutes Template

(Name of Section)

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

Officers: (Names)
Members: (Names)
CASBO STAFF: (CASBO Staff)
Invited Guests: Optional

ABSENT: (Names Absent)

_________________________________________________________

M I N U T E S

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 Section Roster with all contact information

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