



Section Leadership Resource Manual

California Association of School Business Officials
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A Letter from the President and Executive Director



July 14, 2017

Congratulations on receiving the newest edition of our handbook for CASBO Sections! Our goal is to create a useable resource that will provide section leaders with information and materials to assist in the operation of your section and in your program planning. The Handbook is designed to be a leadership tool, an information source, and to provide samples and templates to assist you in your efforts.

Annually, this document will be expanded and updated to include information from the website and data base conversion project and to include more materials and resources. The document will be available to all CASBO members on line in an electronic format.

We wish to thank the member leaders and staff who helped us to create this publication. We welcome your recommendations for changes or additions as well as current samples of documents that you would like to share. We would like to include copies of section rosters, calendars, minutes, flyers, announcements, job descriptions, and governance documents. Please send your recommendations and materials for future inclusion to Michelle Neto, mneto@casbo.org.

Section programs and activities are a life link for many school business officials. Your programs are often the only professional development that local districts 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! Our goal is to help you to make your section activities and programs a success!

With great respect,

Nina Boyd
Associate Superintendent,
Community Student Support
Services Division
Orange County Department of Education
CASBO President
California Association of School Business Officials

Molly McGee Hewitt
CEO & Executive Director, CAE
California Association of School Business Officials

**The NEW CASBO by Design Plan will be adopted by
the Board of Directors late October 2017**

CASBO's History

CASBO is a private, nonprofit corporation, CASBO was founded in 1928 and is the oldest statewide school administrators' organization in California. Association members are the voice of the industry and oversee all areas of school business management and operations, including finance, accounting, payroll, human resources, risk management, transportation, school nutrition, maintenance and operations, information technology, purchasing, school safety and school facilities.

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 goals.

Mission Statement

As the recognized authority on California school business, CASBO is a member-driven association that promotes ethical values; develops exceptional leaders; advocates for, and supports the needs of, members; and sets the standard for excellence through top-quality professional development and mentorship, meaningful collaboration and communication and unparalleled innovation.

Vision Statement

CASBO: The foremost authority in school business.

Beliefs

We believe that public education is essential to a free and informed society.

We believe public trust requires personal and professional accountability and responsibility.

We believe that CASBO fosters leaders who model honesty, transparency, respect and integrity.

We believe that our members, their diversity and their contributions are essential to the overall success of the organization.

We believe that CASBO is member-focused and member-driven.

We believe that ongoing professional development promotes personal success and organizational excellence.

We believe that mentoring develops leaders, promotes growth and builds a tradition of success.

We believe that CASBO excels at providing expertise on issues relating to school business.

We believe that through political advocacy and action, we influence policymakers on school business and finance issues for the benefit of public education.

We believe in embracing change while honoring our traditions.

We believe in partnerships that promote student success.

We believe that the innovative use of technology is vital.

Parameters

We will never lose sight of the value of membership and the importance of our members.

We will never compromise our ethical standards.

We will embrace diversity.

We will ensure that all members have an opportunity to participate.

We agree that all programs, practices, budgets and decisions must be aligned to the mission of CASBO.

We concur that 100% of CASBO leaders at the state, section, council and committee levels must support the mission and vision of CASBO.

We will not allow economic challenges to prevent us from striving for excellence.

Accepted Objectives

To deliver world-class professional development, leadership development, professional certifications and mentorship opportunities.

To be the recognized leader and the preeminent legislative policy advocate for school business and finance.

To ensure that members recognize the value of membership by active participation and increased use of services.

To double the association's membership in the next five years.

Strategies

I. Membership

We will create and implement quota-driven membership growth and retention initiatives that promote the value of membership, increase participation and enhance the utilization of services.

II. Legislative

We will aggressively advocate for sound policy on school business and finance issues.

III. Communication

We will transform and re-imagine CASBO's communication plans, publications, website, social media and marketing strategies.

IV. Professional Development

We will provide high quality programs and services that address professional and leadership development, including certifications and mentorships, using a variety of innovative delivery methods.

V. CASBO Leadership

We will develop and promote exceptional leadership throughout CASBO.

CASBO Code of Ethics

The California Association of School Business Officials maintains standards to guide its membership and help ensure the reputation of the 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.

This 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 organization 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 his or her 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 organization and its members, all activities shall be in accordance with CASBO Bylaws and Manual of Procedures.
- Members have an obligation to support the profession and organization and not to 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 CASBO Bylaws and MOP.
- Members shall uphold all State and Federal laws, as well as their individual District policies and procedures.
- Members shall strive for excellence and innovation to enhance the organization 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.

This 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 the CASBO 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 organization that gives ethical conduct the highest priority while cultivating a culture of accountability and transparency. This policy will be reviewed periodically.

CASBO Professional Standards

California Association of School Business Officials (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 their 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 impacts school districts, county offices of education, charter schools and other education organizations as well as the local community, parents, and students. It is the goal of CASBO to delineate guiding principles via this professional standards document to assist each member in understanding their individual role and to provide tenets for daily practice that produce positive results. 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 on professional standards of conduct become a framework to support the evolving role of school business professionals and form the foundation of daily decision making.

The school business official understands and demonstrates ability in the following areas 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 organizations, 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 wellbeing of the organization.

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 organization.
- Understand and utilize 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 as well 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 CASBO organization.
- 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 policy makers.

Advocate for professional conditions and resources that will improve learning environment, outcomes, and delivery of educational programs.

CASBO Sections

There are seven sections 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 the 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 the board deems appropriate.

Section Bylaws Template EXAMPLE

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 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 Job Descriptions (*Courtesy of 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

1. Coordinator of the Job-A-Like.
 - 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.
- Coordinates Section Professional Council.
- Attends State Professional Council meetings.
- Submits all expenses for the current year to the Treasurer by June 1.



Current - [State Legislative Platform](#)

CASBO aggressively advocates for sound policy in the areas of school business and finance. Through political advocacy and action, CASBO seeks to influence state and federal policymakers on business and finance issues for the benefit of public education.

The principles contained in the legislative platform for the California Association of School Business Officials (CASBO) provide basic parameters to guide positions adopted by CASBO's Legislative Committee and the Board of Directors on matters that are pending before the California Legislature. The platform and principles are consistent with CASBO's mission, strategic planning process, and initiatives.

CASBO Advocacy Network

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.

You can support CASBO's advocacy efforts by taking action now with our e-advocacy tools. Contact elected officials, track votes, stay informed on important issues of the day.

Learn more by reading more about our policy positions, by taking action through our online tools and by accessing important resources we've selected for additional information.

- Join CASBO's [Advocacy Network!](#)
- Look up legislation, position on bills, and letters, search [here](#).
- Look up your legislator and contact information, click [here](#).

Governance Meeting Expense Reimbursement

With the exception of associate members, CASBO members are eligible for approved expense reimbursement when attending CASBO governance meetings at the state and section levels (Board of Directors, Executive Committee, standing committees, operational committees, professional councils, task forces, etc.), except when the meeting is scheduled during the state Annual Conference.

Active, Honorary Life and Retired Members

Active, honorary life, and retired members, as defined in the organizational bylaws, will receive approved expense reimbursement for attending state governance meetings, when requested and authorized to attend.

Associate Members

Associate members provide for their own transportation, accommodations, meals and other expenses as necessary to participate in association activities.

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 portage tips. Expenses claimed without authorized approval or a receipt may be denied. The following expenses are reimbursable, when necessary:

1. **Lodging**, when necessary. 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 the Executive Director.
2. **Transportation**, when necessary. Ground transportation (private vehicle, taxi/shuttle and tips, car rental, etc.) 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.
 - c. When flying Southwest, *Anytime* or *Wanna Get Away* fares are acceptable. Business select fares are not reimbursed.
3. **Meals** at actual and necessary costs not to exceed the current standard IRS meal allowance guidelines.

4. **Miscellaneous:** Parking, portage tipping, bridge tolls, telephone, printing and other similar reasonable expenses are reimbursable at actual cost.
5. **Receipts:** Expense claims submitted for reimbursement must include itemized receipts for meals and other activities. Summary receipts will not be reimbursed.

Timeliness of Claims

Expense claims must be **completed, approved and submitted to the state office within 60 days** from the time of the expense in order 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 utilizing 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 percent for taxis.

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.

Approval of Claims

- Claims from governance group members must be approved by the group's chair.
- Claims from governance group chairs must be approved by the Executive Director.
- Claims from board members must be approved by the 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 professional council) 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 organization. When expenses are to be covered, those expenses shall be included in the CASBO budget under the appropriate item.

[Travel Expense Claim Form](#)

Creating Dynamic and Effective Section 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-a-Likes, 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 utilizing 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!

These pages are designed to provide you with new ideas and resources.

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 utilize a variety of delivery options.
- Experiment and try new ideas!

Please note that, to insure you will have a good audience for your programs, you need to begin to advertise and promote the event at least six weeks in advance! The sooner you start advertising, the better! An annual calendar will assist in creating a quality program with maximum participation.

Some ideas to help you:

- Involve your entire board and professional council 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, PC's, and past attendees. Use members to distribute the flyers or access COE services to help.
- Utilize 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 amount 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.

Some Guidelines to follow:

- Price carefully! Remember that individual members and organizational member districts/LEA's 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. Are your programs designed for specific disciplines? Do you need to
- Market the program and the speaker.
 - Features and benefits – think about what the unique features are and what benefits the program will provide the attendees.
 - Think of the benefits to the attendee and to their employer
 - Think “Value Added “, if I attend this program, what will be the value added to my career or LEA.

People want to know:

- | | |
|------------------------------|--------------------------|
| ○ Who should come? | ○ Time, Location, Cost |
| ○ Why should they come? | ○ Contact Information |
| ○ What will they learn? | ○ Directions and Parking |
| ○ What will they leave with? | |

Find a Need and Fill It! In developing programs:

- | | |
|---|---|
| • Listen to your colleagues | • Find best days of the week and best times |
| • Ask them what they want? | • Full day or half day? |
| • Ask their supervisors what they need? | • Lunch and learn? |
| | • Webinars? |

Get Creative!

Think out of the box! There are other ways to transfer information. Here are some ideas:

- Centers
- TED Talks
- Panels of experts
- Point and counterpoint speakers
- Multiple speakers/options

Types of Sessions

SNAP Sessions	30 minutes
IGNITE Sessions	15 minutes each
Deep Dive Sessions	2+ hours
Intensives	3-6 hours
Clinics	6-12 hours
Game Changers	1-2 hours
Workshops	45-60 minutes

Job-a-Like Programs:

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

- *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 handouts or materials that can be shared 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:*
 - *Name*
 - *Title/Position*
 - *District*
 - *How long in their current role?*
 - *Major responsibilities?*
 - *Greatest challenge?*
 - *In order to be more effective in my job, I need:*
 - *What one piece of advice would you offer to people new to our profession?*
 - *What do you hope to learn today?*

Things to Avoid – Traps and Tunnels

- Too cute
- Not enough information
- Repeated programs
- Use of copyright materials
- Poor power points
- Sales pitches
- Poorly prepared speakers
- Outdated topics
- Using the same speakers over and over

Never Forget to Evaluate!

- Program
- Speaker
- Location
- Time
- Determine if you will use a Survey Monkey Electronic Evaluation system or a paper evaluation.

Share results with your presenters! If the score is less than 70%, improvements must be made!

Where to get your speakers

Suggestions:

- CASBO Staff
- CASBO Officers
- Associate Members
- AMC Speakers Bureau
- Annual Conference Presenters
- COE
- CDE
- City or County Agencies
- Emergency Services
- Hospitals
- Universities
- Community Colleges
- Toastmasters
- TV or Radio Station
- Newspaper Columnists or Editors
- Elected Officials
- Key Officials: Police Chiefs, fire Marshals, Postmasters
- Professional Associations
- Students
- PTA's
- Constituent Leaders
- Local business or Chamber Members

Planning your Programs – What to talk about

- Trends
- Issues
- News
- Hard Skills
- vs. Nice to know
- Soft Skills
- Popular
- Need to know

Think about your Audience

- Who would benefit from this event?
- Does anyone else offer this?
- Does it meet CASBO Standards?
- Why will they come?
- Convenient Location?
- Online options
- Hours

Program Ideas

- Image
- Leadership
- Interpersonal Communication
- Certifications
- Health
 - Life Balance
 - General Wellness
- Communications and Marketing
 - Social Media
 - Public Relations
 - Public Speaking
 - Writing
 - New and Updated Office Programs
- Management & Supervision
 - Evaluation
 - Morale
 - Teambuilding
 - Employee Training
 - Employee Orientations
 - Employee Retaining
 - Employee Dismissal
- Technology
 - Apps
 - Cyber Security
 - Tablets
 - Trends
- Customer Service
 - Phone skills
 - Serving our diverse publics
- Education IQ
 - 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

CASBO Speaker and Presenter Criteria

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

Overriding Principles in Selecting a Speaker or Presenter

1. The speaker or presenter must provide the best educational opportunity to audience.
2. The opportunity to address CASBO audiences is a privilege.
3. Presentations shall not be a vehicle for directly advertising products or services.

Speakers

A Speaker is a person or persons who deliver a message to an audience at a conference.

- Speakers include:
 1. Subject matter experts;
 2. Celebrities;
 3. Professional speakers,
 4. Dignitaries.
- Selection based on:
 1. Subject relevance;
 2. Interest to our members;
 3. Political acumen,
 4. Ability to engage audience.
- All Speakers should meet the majority of criteria in the attachment.
- Paid speakers and invited keynote speakers:
 1. Annual Conference, CBO Symposium, CBO Boot Camp, Regional Workshops will be vetted by the Professional Staff with input from CASBO Leadership.
 2. Section Events and Workshops will be vetted by the Section Board.

Workshop Presenters

A Presenter is a person or persons who deliver instruction in a workshop or conference setting.

CASBO has had a tradition for over 85 years of using its own members to conduct research, study issues, and report findings to members for their professional development through presentations and workshop at all of the professional development venues.

Priority of Presenter Selection (in order of preference)

1. Qualified Members
2. Qualified Associate Member
3. State Department and FCMAT Officials
4. Other outside/Non-member Presenters
 - a. Should be considered only after first considering those above.
 - b. Considered when a special kind of expertise, experience, presentation or deliver is not found among out cadre of regular and associate members.

Identifying Qualified Speakers

1. The individuals selecting a speaker or presenter should make appropriate reference checks of those speakers and presenters they are not directly familiar with.
2. The CASBO group sponsoring the presentation will self-monitor the quality of the speaker and provide appropriate feedback both positive and negative to the speaker or presenter.
3. CASBO State Office Professional Staff

Recruiting and Retaining Involvement through Micro volunteering

Membership

- We want members who want to belong.
- The new membership structure brings in more opportunities.
- Why people join.
 - Career advancement
 - Information that they need
 - Value to professional life
 - Professional certifications
 - Recognition
 - Networking
 - Friendship
 - Prestige

What CASBO has

- Promotes leadership at all levels.
- Bring all disciplines together
- You need to work with other disciplines to succeed
- Skill development
- Certifications
- Advocacy
- You do not have to be in management to belong!
- No other place you can go to network with all disciplines

How to attract new volunteers and members

- Create a master list of volunteer opportunities in your section or council.
- 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.

Determine jobs... manage 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
- Registrar
- Write a review of a program, article, or book
- Write an article for newsletter
- Judge for a project
- Focus group member/leader
- Create a program
- Preside at a meeting
- Host a pre-meeting program
- Develop an Annual Conference Workshop
- Nominate for Awards/Roles

Member Recognition

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

At the state level, CASBO has a well-defined and member driven program for awards and recognition. Unfortunately, many times, awards remain unused due to a lack of nominations. Please read the Awards page carefully to determine if your Section or Council would like to participate. Please contact Gail Hillis at CASBO for more information (ghillis@casbo.org).

Member 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, and 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 and guests? Personal recognition is also rooted in respect. Respect for expertise, for involvement, for support, for their time and for their participation. Great programs are an excellent way to show members and potential members 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 and Professional Councils are great vehicles to do this!

Here are some ways you can recognize CASBO members:

- Including names of presenters, committee members and volunteers in programs and materials distributed at events.
- Creating a power point loop to be played before, during and after programs with names and pictures is possible.
- Making sure your web page is updated with correct names, titles, and pictures.
- Presenting awards and recognition tokens. A certificate, plaque or token of appreciation is a lovely gesture and could be displayed in their office.
- Writing letters of appreciation to their superintendent, board and direct supervisor thanking them for supporting the individual and complimenting them on their achievement.
- Introductions at events. Public ally thanking and introducing people so that others know who they are and what they contributed.
- Notes or emails of thanks and support.

- Articles on the website or in CASBO publications.
- Encourage new members to participate by allowing them to introduce speakers, host an event or participate. Share the spotlight and build leadership potential.
- Recognize and thank people continually. People need positive reinforcement!

CASBO Annual Awards

Smart Business Award

CASBO presents this award to an individual or organizational member for innovative, creative and meaningful contribution 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

[FORMS FOR EACH NOMINATION ARE AVAILABLE ON THE CASBO WEBSITE](#)

Associate Members

CASBO is proud to partner with our Associate Members to serve our members! Associate Members are vendors and suppliers who have made a commitment to our association through their membership and participation.

The CASBO Associate Member Committee is composed of associate members who are appointed for three year terms and act as representatives to the board, the sections, and to our professional councils. They operate much like a professional council in the CASBO structure. Their chair also serves on the CASBO Board of Directors.

A current roster of the [Associate Member Committee \(AMC\)](#) is on the website. 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 Associate Member Committee supports CASBO in a variety of significant ways. These include:

- The Robert Reeves Scholarship Program (a \$1,000 scholarship awarded each year in each section for professional development)
- The Sky Joyner Award – CASBO’s highest honor to a member for service to the association and the profession.
- Support of CASBO events that include financial support of the Annual Council First General Session and the reception at the CBO Symposium.
- Membership and service on a variety of committees and positions in the association.
- Direction and implementation for the Golf Tournament at the Annual Conference and the awarding of funds for conference scholarships.
- Support of the Annual Conference Hospitality Suites.
- Support and participation in the Associate Member Academy program and designation.
- Sponsorships of events and association programs at the state and section levels.
- Providing speakers and programs assistance at the section level and during the Annual Conference.
- Participation in CASBO by Design
- AMC Speakers Bureau

Partnership Program

CASBO partners are carefully vetted to ensure they are of the utmost value to our members. To become a CASBO Strategic Alliance Partner, your 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. Benefits of the Premier Plus and Premier Partnership levels are listed below.

To learn more about our CASBO Partnership program opportunities please contact: Tatia Davenport tdavenport@casbo.org or (916) 504-2249

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 include:**

- **Educational webinars**, *exclusive* opportunity to present to the CASBO community
- **Year-long visibility and recognition** at our statewide events and on our website
- **Use of CASBO's Premier Plus Partner brand indicia**
- **First rights* to annual Sponsorship Opportunities selection**
 - \$10,000 allowance toward event sponsorships
- **First rights* to Annual Conference booth selection**
 - One premium in-line 10'x10' exhibit space at Annual Conference
- **Invitations**
 - Four invitations to President's Dinner at Annual Conference, a "*by invitation only*" event
 - Partners Annual Meeting
- **Advertisements**
 - Full-page color ad in our Annual Conference program guide
 - Half-page color ad (landscape) in four issues of our quarterly magazine, California School Business
 - Web-brick ad for 12 consecutive months on our website
 - Enhanced listing and "Featured Company" status in our Online Buyers Guide
 - Online ad for a one-month period (two issues) in our bi-monthly eNewsletter, California School Business News
- **Thirteen memberships**; receive communications and the opportunity to participate on CASBO committees
- **Opportunity to participate** in our Affinity Program*

**First rights for Premier Plus Partners occur after Strategic Alliance Partners, and prior to Premier Partners.*

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 include:

- **Educational webinars**, *exclusive* opportunity to present to the CASBO community
- **Year-long visibility and recognition** at our statewide events and on our website
- **Use of CASBO's Premier Partner brand indicia**
- **First rights* to annual Sponsorship Opportunities selection**
- **First rights* to Annual Conference booth selection**
 - One *regular* in-line 10'x10' exhibit space at Annual Conference
- **Invitations**
 - Two invitations to President's Dinner at Annual Conference, a "*by invitation only*" event
 - Partners Annual Meeting
- **Advertisements**
 - Full-page color ad in our Annual Conference program guide
 - Half-page color ad (landscape orientation) in one issue of our quarterly magazine, *California School Business*
 - Online ad for a one-month period (two issues) in our bi-monthly e-Newsletter, *California School Business News*
 - Enhanced listing and "Featured Company" status in our Online Buyers Guide
 - Web-brick ad for three consecutive months on our website
- **Nine memberships**; receive communications and the opportunity to participate on CASBO committees
- **Opportunity to participate** in our Affinity Program

**First rights for Premier Partners occur after Premier Plus Partners, and prior to Associate Members.*

Robert “Bob” Reeves Section Scholarship

Guidelines and Qualifications

Each CASBO Section Board may select an individual from their section who is pursuing education in the school business profession as long as the Section has an active Associate Member Liaison. Specifically, an active CASBO individual member who meets one of the following requirements may apply:

- An active CASBO individual member enrolled in an education program which will lead to or promote progress within school business profession as a CBO or School Business Professional at the elementary, secondary, or community college levels.
 - An individual currently in the education field who desires to expand their knowledge related to school business profession as a CBO or other School Business Professional.
 - Post graduate business profession candidate in the school business profession at a college or university in support of CBO or other School Business Professional training.
 - It is preferred, but not required, that funds provided by this scholarship be spent on programs offered by CASBO or an accredited college or university in a degree program.
 - Candidates are eligible to apply every year. Past scholarship recipients are not eligible for five years after receipt of scholarship.
-

Applicants shall be required to provide the following information when applying for the scholarships:

1. Name of Individual.
2. Work and Home Address.
3. Work and Home Phone Number.
4. Current Job Title, School District, and amount of time at job.
5. A five-year work history
6. The number of years the applicant has been a CASBO member, CASBO leadership roles, CASBO activities, and dates of each. ***Individual Membership in CASBO required***
7. The number of years the applicant has been involved in other professional organizations, leadership roles, activities, and dates of each.
8. Proposed use of scholarship funds. Describe in detail your educational plans in detail and your ultimate educational goal or outcome.
9. Three (3) references (name, title, phone number, e-mail address).

After the CASBO section board has made their selection of the recipient for The Robert “Bob” Reeves Section Scholarship, the section board shall provide copy of the recipient’s application to their active Associate Member section liaison. The Associate Member liaison from the section shall submit the recipient’s application to the CASBO Office and the Associate Member Committee. Upon approval by the Associate Member Committee, and upon receipt of this information by CASBO staff, staff will issue to the Section Board President [or Associate Member Liaison] a check in the appropriate amount payable to the recipient. It is the desire of the Committee to have the annual checks presented to the sections on or before December 31 of each calendar year.

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.

CASBO and the Associate Member Committee will also make an announcement recognizing the successful recipients from each section during the next Annual Conference and in CASBO publications.

Bob Reeves Section Scholarship Application

Robert Reeves Scholarship

Applicant Check List

- Obtain relevant documents
 - Scholarship Fact Sheet
 - Scholarship Guidelines and Qualifications
 - Scholarship Application
- Check Pre-requisites for Eligibility (listed in Guidelines and Qualifications document)
 - Active CASBO Member
 - Currently in the education field with desire to expand their knowledge in the school business professions
 - Has not received this same scholarship within the past five years.
 - Preference for those pursuing formal education or professional certifications
- Obtain Professional References
- Complete Application
- Send Application with professional references to your designated Section contact no later than September 20, or earlier date designated by Section Board.

Organizational Subscription Benefits

Any California school district, charter school, county office of education or community college district is eligible. Once your organization joins, **all your business services employees** become CASBO enrollees. That means anyone who is looking for professional development in our 15 school business disciplines is eligible – even your personnel who might be wearing multiple hats! And they'll all have access to benefits, including the discounts we offer for training and events.

Career Builder Membership

A Career Builder membership is for those individuals that want to take their career to the next level. You get access to career building webinars and resources, which don't exist with the organizational subscription.

Meetings and Schedules

Meetings must be approved by the board in the beginning of the fiscal year. This occurs between April/June of every year. Professional Councils will at times be given a set time during an event to conduct meetings.

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 vast majority of the association's governance groups.

When meetings, including section governance meetings, are scheduled in locations other than the CASBO office, the following apply:

1. Meeting locations must be chosen that are convenient for the majority of members attending.
2. The choice of locations and activities must reflect positively on the association.
3. No governance group meetings may take place out-of-state.

Single-Day Meetings

1. In order to minimize the impact of travel on committee members, decrease the need for overnight travel, and to contribute to the effective management of association resources, current CASBO policy requires all governance group meetings to be single-day, in-and-out meetings.
2. Requests by individuals for overnight stays in conjunction with established meetings must be approved in advance by the Executive Director.

Alternatives for Meeting Attendance

Current CASBO policy requires that half of all state committee and professional council meetings take place via conference calls or virtual meeting using CASBO's virtual meeting providers. Section committees and professional councils are also expected to utilize conference calls and virtual meetings to reduce meeting expenses and to simplify member participation.

Face-to-Face Meetings

Meeting at the CASBO office is always encouraged! Call the CASBO office at (916) 447-3783 to schedule the CASBO Conference Room.

Conference Calls/E-Meetings/Go-to-Meetings

Contact Michelle Neto (mneto@casbo.org) to make arrangements.

Agenda Template



(Name of Section)

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

Chair: John Doe
Members: (Section Members names)

CASBO STAFF: (CASBO Staff)

Invited Guests: (Optional)

A G E N D A

ITEM 1 APPROVAL OF AGENDA

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

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

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

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

Adjourn

Future Meetings/DATE/LOCATION:

Date of next meeting
Address of next meeting

Attach Committee Roster with all contact information

Attach MIINUTES from previous meeting

MINUTES

Minutes Template



(Name of Section)

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

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

ABSENT: (Section Members Absent)

MINUTES

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

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

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

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

Time of Adjourn: _____

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

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

Attach Committee Roster with all contact information

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***

October 10, 2012

Hello CASBO Southern Section Retirees!

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

Invitation to Attend Events

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

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

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

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

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

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

Minutes of State Retiree Professional Council Meeting

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

Feedback Requested

Since this is my first attempt at outreach to Southern Section retirees, I would appreciate your feedback on the following questions:

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

- 2) Do you have any interest in attending either of the events described in this email? If yes, which one(s)?
- 3) Are you interested in attending meetings of the local Southern Section Professional Councils (formerly known as Section R&D committees) (e.g., Finance, Payroll, Accounting, Child Nutrition)?
- 4) Are you interested in getting together informally with other CASBO retirees for lunch?
- 5) Would you be interested in applying for the position of Southern Section representative on the State Retiree Professional Council when that position becomes vacant in 2012?
- 6) As a retiree, how would you like to participate in CASBO?
- 7) Any other thoughts or comments?

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

Debbie Simons
Southern Section Representative
CASBO State Retiree Professional Council
(Former Director, Division of Business Advisory Services,
LA County Office of Education)

(insert name, contact information, and attachments)

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***

January 7, 2012

Hello CASBO Southern Section Retirees!

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

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

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

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

Minutes of State Retiree Professional Council Meeting

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

Feedback Requested

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

- 1) Do you want to receive further communications of this sort?
- 2) Do you have any interest in attending either of the events described in this email? If yes, which one(s)?
- 3) Are you interested in attending meetings of the local Southern Section Professional Councils (formerly known as Section R&D committees) (e.g., Finance, Payroll, Accounting, Child Nutrition)?
- 4) Are you interested in getting together informally with other CASBO retirees for lunch?

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

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

7) Any other thoughts or comments?

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

(insert name, contact information, and attachments)

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***

March 22, 2012

Hello Southern Section Retirees!

Conference Update

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

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

More details about these workshops can be found on page 21 of the Conference

Brochure: http://www.casbo.org/associations/7093/files/CASBO2012_reqbroch_proof8.pdf

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

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

Date: Thursday, April 12

Time: 1:30 to 3:45 p.m.

Location: At the conference - room to be announced

Retiree Meeting Held at January Job-Alike Event

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

- Conference sessions for retirees should be consolidated on the days that most retirees attend.
- Conference workshops should be held on topics such as *How do I Become a Consultant* (how to price your services, whose contract do you use, panel discussion); *How to Market Yourself as a Consultant* and *Staying Current with Technology*.

- How often do districts use the Retiree Interim Service Search section on the CASBO Website to hire retirees as consultants? How can CASBO help market retirees to districts? Can County Offices help with this?
- Can School Services of California offer a special subscription rate for retirees who work part-time at districts?

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

(insert name, contact information, and attachments)

Guidelines for Reports to the CASBO Board of Directors

The CASBO Board of Director’s meets four times a year in June, October, January and April. At each of these meetings, a written report is requested from: State Directors, Professional Councils, Standing Committees: The Professional Standards and Leadership Committee, The Continuing Education and Certification Committee, the Legislative Committee and other groups as requested. While time is reserved during the meetings for a discussion of these reports, a written report is requested.

At the beginning of each fiscal year, CASBO will notify effective leaders and chairs of the timelines for submission of these reports. Agendas are sent in advance of the meetings, so the timeline enables you to meet the timelines and insure that your reports are included. Reports submitted after the deadlines are delivered to the Board at their meeting.

A report to the board is a factual representation of what has occurred since the last report was given and may include items that include but are 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, successes and challenges being experienced and any request for information or assistance. The goal of the report should be to inform and enlighten the board of directors on the progress and actions of the group and to provide feedback that enables them to make informed decisions.

The reports are normally one page in length and may be longer. Sample reports are attached to this document for your reference. CASBO publications standards include the use of our logo and recommend that reports are single spaced, use Times New Roman type 12 font, and include the name of the group, who has prepared the report and the date presented.

Board Agenda Schedule – Fiscal Year 2017-18

Board Agenda Schedule

Fiscal Year
2017-2018

Meeting Date	Minutes Review	Agenda Items Review	Agenda Reports Due	Final Agenda Packet Review	Agenda Packet Available in Board Effects
October 28, 2017	Monday, September 18	Monday, September 25	Monday, October 2	Tuesday, October 17	Friday, October 20
January 27, 2018	Monday, December 4	Monday, December 18	Monday, January 8	Tuesday, January 16	Friday, January 19
April 4, 2018	Monday, March 12	Monday, March 19	Monday, March 5	Friday, March 23	Wednesday, March 28
June 9, 2018	Monday, April 30	Monday, May 7	Monday, May 21	Wednesday, May 30	Friday, June 1

Board Report Template



To: (Name), President

From: (Director Name), _____ Section State Director

Regarding: Board Report

Date: (Date of Board Meeting)

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***



To: Leeann Errotabere, President
From: Nita Black, Northern Section Director
Regarding: Board Report
Date: June 13, 2015

The Northern Section Board held its end of year meeting on May 15th at the Hayes Mansion in San Jose. We were happy to welcome Molly to our meeting where she provided Professional Council and leadership training to our board and Professional Council chairs. The information she presented was insightful and will sure to be helpful as our section PC chairs move in to the new year. We were also excited to hear about the upcoming Camp CASBO and many of our board and PC chairs have registered and are ready to learn more.

We have had a large turnover on our section board of directors. There have been some unexpected resignations. We were able to sign on a couple temporary 1 year replacements and have recruited a new Director. There will be some challenges the following year as we anticipate 3 open positions and a long-time board member plans to retire. We realize as times have changed, we might need to consider making some changes to our previous practices. We will be looking to the State office for direction and suggestions.

Our Professional Council seats are nearly all filled. The board will be focusing on recruiting assistant chairs for our councils so we can maintain excellent leadership for our members.

The Northern Section Board is happy to report another very successful year. We were able to provide many trainings and workshops to our section members. We continue to strive to service our members by providing leadership as well as quality and relevant professional development.

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***



To: Leeann Errotabere, President
From: Brad Rohrbach, Central Section Director
Regarding: Board Report
Date: June 13, 2015

1. Reorganization Meeting

On May 1, the Central Section Board of Directors and Professional Councils met at the Cambria Pines Lodge in Cambria, CA and held their annual reorganization meeting. The meeting included transition of board members to new positions, planning for 2015-16 events and timelines, and CASBO Leadership Training by Molly McGee-Hewitt. The board also visited Hearst Castle and convened for dinner, awards, and recognitions.

2. Director and Professional Council positions

New to the board of directors include is **Michael Clear as Director III, Annie Arounsack as Accounting PC Chair, and Marcus Wirowek as Human Resources PC chair.** The board currently has vacancies for technology and purchasing professional councils.

3. Golf Tournament and Scholarships Awards

The central section golf tournament designed by Michael Johnston, Clovis Unified and is designed to support the Pat Kraft Scholarship continues to be successful and has great support from the Associate Members of the Central Section. Based upon the last year successful tournament the awards committee recommended and board awarded \$1,000 scholarships to all eight individual members who applied. These scholarships support individuals pursuing courses of study and/or certificate programs that further their career development and opportunities.

4. CASBO Leadership Training

Molly McGee-Hewitt and Leeann Errotabere attended the reorganization meeting and Molly provided leadership training on the both broad vision of CASBO and specific ideas for leadership within each position at the section and professional councils. During the training, time was provided for discussion and questions allowing for an exchange of ideas for the section board to consider implementing and also ideas were suggested for State CASBO to consider. Simply impressive are the efforts by Molly, staff, and sections which are enhancing the association of school business and its' impact for the future of students in California, and beyond.

5. Central Section MOP subcommittee

The Central Section board established a standing committee, the Manual of Procedures (MOP) Committee, who will review and monitor the section MOP, and will compare with CASBO State MOP to ensure section is effectively operating within State guidelines.

6. Annual Events

Planned events for the year include the following:

- September 24th, 2015 Golf Tournament – Dinuba Linx Golf Course
- September 25th, 2015 Fall Conference – Holiday Inn Visalia
- December 4th, 2015 Winter Luncheon – Harris Ranch, Coalinga
- February 5, 2016 Job-A-Like – Kern County Superintendent of Schools – Bakersfield
- May 6th, 2016 Reorganization Meeting – Location to be determined

2015-2016 Board of Directors and Professional Council Chairs

- | | |
|--|---|
| Jamie Dial , President | Monette Taylor , President-Elect |
| Dawn Riccoboni , Immediate Past President | Jay Serratore , Past, Past, President, CBO Chair |
| Brad Rohrbach , State Director | Chris Mano , Secretary |
| Grant Schimelpfening , Director I | Jamie Perry , Director II |
| Michael Clear , Director III | Fanchon Owen , Treasurer, Retiree Chair |

Professional Council Chairs

- | | |
|--|---|
| Annie Arounsack , Accounting | Regina Ocampo , Child Nutrition Co-Chair |
| Alex Carrillo , Child Nutrition Co-Chair | Richard Sepulveda , Facilities |
| Kassandra Booth , Financial Services | Marcus Wirowek , Humans Resources |
| Brad Pawlowski , Maintenance & Operations | Maria Contreras , Payroll |
| Garth Maijala , Risk Management | Joy Frantz , Transportation |
| Kathleen Neff , Associate Member Liaison | Chris Cuevas , Asst. Associate Member |

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***



To: Leeann Errotabere, President
From: Rich De Nava, Eastern Section State Director
Regarding: Board Report
Date: June 13, 2015

Many things are going on within the Eastern Section as we prepare for another great year! I was able to attend the Eastern Section Executive Board meeting in May. Our next scheduled meeting will occur on June 5, a week prior to the upcoming State Board of Directors meeting.

As the new positions within the Eastern Section Executive Board have become situated, the most recent board meeting provided an excellent kick off to the year ahead for Eastern Section. Many topics of discussion took place as well as a new member's arrival to the Board (Jeff Trader – Director IV). Planning is already underway for the section leadership training to be held on June 5, 2015. The board is looking forward to the engagement amongst the State leadership team and the local section to ensure we are in alignment as we move forward.

Other Topics of Interest

- Camp CASBO – there was considerable interest from Eastern Section to attend Camp CASBO 2015. The majority of the Executive Board will be in attendance and it will also provide a great opportunity for the members to network and conduct some of its business during the down time!
- Eastern Section Golf Tournament – planning is ongoing for the 12th Annual Golfing for Scholarships tournament. At the current time, a venue has not been decided but multiple considerations are on the table for an affordable, convenient location that will provide for networking, collaboration and a professional development session similar to what was provided in 2014 (School Services of California presented to a group of CBOs/business officials). Tentative dates are September 23, 24, or 25th
- Eastern/Southern Section Joint Vendor Show - planning is also ongoing at this time. The date has been set for 10/21/15 at the Pomona Fairplex.

Openings on Eastern Section Professional Councils:

- Technology

I am looking forward to the collective work ahead of the CASBO Board of Directors. I am humbled and honored to be able to serve with each of you!

***Sample * Sample * Sample * Sample * Sample * Sample * Sample ***
Board Meeting Recap Sample – Sent on Your Behalf



Dear Colleagues,

As the Southern Section Director, I want to take a few moments to share with you information on the June meeting of the CASBO Board of Directors and Education Advocacy Foundation (EAF).

The group had the opportunity to meet for two days in Napa for our Annual Retreat and June Board meeting. This year, CASBO leadership included new board members, Richard DeNava (representing the Eastern Section), Kristi Blandford (representing the Sacramento Section), and Lydia Cano (representing the Southern Section). Other changes include our new Vice President Nina Boyd; Associate Member Committee Representative Harold Friedman; EAF Chair Renee Hendrick; and Legislative Committee Chair Eric Dill.

Annually, the group holds a one-day retreat prior to the June meeting. Under the guidance of CASBO Past Presidents and Governance Trainers, Pearl Iizuka and Renee Hendrick, the group participated in a program designed to enhance leadership and communication and review protocols and procedures for Board effectiveness. Members of CASBO staff also joined us, including Executive Director Molly McGee Hewitt, Deputy Executive Directors Tatia Davenport and Jeff Vaca, Chief Financial Officer Art Schmitt, Advocate Enrique Ruacho, and Director Michelle Neto. During the afternoon, we learned about leadership styles using the DiSC system and created a video for Camp CASBO.

On Saturday, June 13, CASBO President Leeann Errotabere conducted our first meeting of the new year! As a reminder, the CASBO Board meets in June, November, January and April of each year. The officers serve as an executive committee and meet monthly on CASBO business.

June Board meeting actions, discussions, and reports included:

- Individual reports from the officers, Board members and the executive director were received.
- Written reports from the sections, Professional Standards and Leadership Committee, Continuing Education and Certification Committee, Annual Conference Committee, Annual Conference Volunteer Task Force and Associate Member Committee were received and reviewed by the Board. The Board also received the schedule for the 2016 CASBO Annual Conference & California School Business Expo.
- Molly McGee Hewitt presented her Executive Director's report which included a SWOT analysis from our executive staff, updates on section and Professional Council leadership training, consolidation and acceptance of a grant program from the Friends of Education, introduction of our new mentorship programs (Member to Member and the Leadership Link), and other programs and activities. Molly also reported with regret that Jeff Vaca has secured a new position and will leave CASBO in early August. Molly and the Board wished Jeff well in his new assignment and thanked him for his service to CASBO. Leeann Errotabere presented Jeff with a gift of appreciation from the Board.
- An update on ASBO International was presented. The Board has endorsed CASBO Past President, Michael Johnston, to run for the ASBO International Board of Directors in 2017. It

will be great to increase our participation and visibility at the national and international level! This year, CASBO members and officers will present five workshops during the ASBO International Annual Conference in October in Grapevine, Texas.

- The Board received a report on CASBO by Design from Facilitator Pearl Iizuka that provided information on the activities of each implementation team toward the five identified strategies. The original planning group will meet on August 10, 2015, to review progress and update the five-year plan. Plans are currently underway to create the process for our next plan which will start in 2017.
- Molly presented an update to the Board on how the staff is aligning the CASBO by Design strategies and plans to organizational initiatives.
- As a part of the governance duties of the Board, the group ratified and approved Professional Council appointments, the master calendar, Board meeting guidelines and governance protocols, and an annual resolution granting authority to the executive director for association operations. The group also received information on, and was invited to participate in, the evaluation of the executive director.
- Nina Boyd and Art Schmitt presented a budget update and financial report. CASBO exceeded financial revenue projections for the current fiscal year and remained solvent and on track in expenditures and budgeted obligations.
- The 2015-16 budget was presented and approved. The budget includes a projected profit and funds CASBO by Design and Board-approved priorities. In the budget is the addition of 16 new regional workshops and development of a training curriculum for certification programs. Additional expenditures were budgeted to include the major upgrade in CASBO technology that will affect the website and the financial accounting and membership database. An additional support staff member was added to assist with professional development.
- The budget included no changes in the individual dues structure or rates but did include a five percent increase in associate member and institutional membership dues.
- Non-member discounts for CASBO events were eliminated, and registration fees were approved.
- The budget presentation included a review of association fiscal benchmarks and a discussion on the association reserves. CASBO meets, and in most cases exceeds, association standards in fiscal management.
- While a conservative approach was used in budgeting revenue from the 2016 Annual Conference & California School Business Expo, funding for two new mentoring programs, the Executive Level Leadership Academies, the Ignite program and the new workshops were included. New workshops and professional development activities were included.
- Jeff and Eric Dill presented an update, Legislative Committee report and state budget update. Jeff also shared information on the Ignite program. Jeff shared his appreciation with the Board for their support and his admiration for Molly and his CASBO colleagues.
- Tatia presented an update to the Board on communication and marketing activities, the Ambassador Program, publications, membership, professional development activities, partnerships and sponsorships, and upcoming activities and programs.
- The Board approved the addition of professional liability insurance as a membership benefit for CASBO members at the Distinguished Access and Executive Access levels, as well as participation in an association-wide legal benefits program called Legal Shield.

- Tatia also presented ideas to the Board for the restructuring of our organizational membership program and the associate member dues structure. These items will require further study and will return to the Board for consideration in January or April 2016.
- The Board reviewed the proposed agenda and activities for Camp CASBO and other upcoming association events and plans.
- Molly presented an overview of all association activities, initiatives, programs and projects for the upcoming year and also facilitated an assessment of the meeting.

As your Section Director, my goal is to represent you and keep you informed of the actions and activities of the CASBO Board of Directors and leadership. Please feel free to contact me at canol@pvpusd.net with questions or to share information.

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

Thank you for your membership and participation in CASBO!

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 www.casbo.org
2. Hover 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 www.casbo.org
2. Hover 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 www.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 www.casbo.org > [Sections](#):

- See the section map
- Access the [Section Event Registration Setup Request Form](#)*
- Find your own section page by clicking on your section name
- Etc.

**Also available under Resources > Forms and Brochures*

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 www.casbo.org > [Advocacy](#):

- [Policy Action Center](#)
- [NewsBreak advocacy newsletter](#)
- [Ignite LCFF Budget Toolkit & LCFF Guides](#)

CASBO Communications

Understanding the CASBO Brand

Brand Management is Important

With every brand name comes a brand identity, and a responsibility to manage that brand identity. CASBO is no exception. As directed by the strategic plan, guidelines were developed to ensure a uniform look for all communications media. 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), website, wearables and other logo items, section and other materials.

People gain a perception about who we are based on what they see and read in our varied informational and promotional communications. So whether we're CASBO members, association leadership or state office 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 and section level, including taglines and font colors
- Partner indicia usage, including font colors
- CASBO fonts and colors
- 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.

History of the CASBO Logo

In doing research for the development of the CASBO logo, information was taken from 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, of coming together, focus, collaboration, a hub, a center, a focal point of information. From those themes, an abstract logo was designed:

- Elements of different sizes and shapes that converge toward a common goal
- Information and resources radiate out
- Each of the wedges represent one of the CASBO sections

CASBO Taglines

A tagline is another element which helps establish a brand's identity. It's a phrase that captures the overall focus of an organization and how it benefits its members and potential members. CASBO has two taglines:

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

CASBO's Logo and Tagline are Federally Trademarked

This prevents the use of the CASBO logo and/or taglines by any other ASBO, association, private company or individual. It also heightens the level of responsibility for all that use it in order to maintain the trademark.

CASBO Logo and Tagline Usage

We use the logo, tagline, colors, fonts and messaging consistently to reinforce the CASBO brand on

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

CASBO 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, you may request logo files to provide to your graphic designer and/or product fabricator*:

Visit www.casbo.org > Resources > Forms and Brochures > Logo Request Form

*CASBO has an approved, recommended provider that you may use, if you wish. Square One has been the best vendor we've used, but you are by no means under any obligation to use them:

Nancy Warren
Square One Promotional Products
11170 Sun Center Drive, Suite 300
Rancho Cordova, CA 95670
Tel: 916-290-6915
Fax: 916-290-6920
Email: sales@squareonepromo.com
Website: www.squareonepromo.com

To see what is available, visit:

- www.companycasuals.com
- www.4logowearables.com

There is no pricing listed, but Nancy will provide you with a quote when you choose your options and quantities.

Guidelines for Logo Usage

Following are a few guidelines to help maintain consistent usage of the CASBO brand.

- **GUIDELINE #1: Maintain clear space.**
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.) from a digital source, 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 in an effort to "fill" or accommodate an existing 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 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 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 correct section logo.**
Custom logo variations are available and should be used. CASBO section 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 font 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 PC 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 that work from all sections 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, mission are consistently referred to when talking about the association. Below you will find an example of CASBO talking points in bullet format.
 - 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](#), 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 professional councils 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.

Meet Our Staff

CASBO staff has the professional expertise positioned to support our strategic focus and commitment to excellence and professionalism throughout the field of school business management.