



## MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

### Strategic Plan - February 2025

#### **Purpose**

MASBO is dedicated to resourcing the people responsible for business operations in Montana schools, supporting members to manage the business operations that enable the education of our children.

#### **Mission**

Empower School Business Leaders Through Education

#### **Vision**

A connected community of respected school business officials (SBOs) championing the financial security of Montana schools.

#### **Guiding Principles**

- **Empowerment** – We provide high quality professional development and support tailored to our member's needs
- **Advocacy**- We are relentless champions for our member's expertise and well being
- **Collaboration**- We strategically partner to advance the SBOs profession
- **Student-Centered**- We are passionate about ensuring the financial infrastructure to support the education for every student in Montana

## Strategic Directions and Goals

Category	Goals	Objectives
<b>Training and Support</b>  Professional development opportunities and services are relevant, affordable and accessible.	1. Maintain a strong and vibrant mentor program.	1a. Develop a mentor orientation. 1b. Facilitate opportunities for mentors to communicate and share ideas.
	2. Implement the Learning Management System.	2a. Develop an online library of professional development resources that can be accessed in real time or at-will. 2b. Utilize the learning management system to track and evaluate online trainings.
	3. Facilitate a range of relevant professional development opportunities, both live and through distance learning.	3a. Develop certifications in specific areas, including payroll and budgeting. 3b. Develop short trainings on specific topics including payroll, tuition, TFS and student activities. Consider basic, intermediate and advanced micro trainings for SBOs. 3c. Expand support to include human resources and payroll.
<b>Partnerships and Advocacy</b>  MASBO has strong partnerships with key stakeholders and advocates for its members.	1. Engage partners in trainings when appropriate.	1a. Work with college classes to promote the SBO Manager Position. 1b. Create a curriculum for Business School Finance.
	2. Leverage partnerships to provide additional professional development opportunities and resources for MASBO members.	2a. Develop joint training beyond MCEL with SAM (i.e. roles w/superintendent, SBO in relation to training for TEAMS and civil rights report and e-grants reports).
	3. Inform membership of MASBO's legislative efforts in partnership with MT-PEC.	3a. Provide legislative update emails, include legislative information in the monthly newsletter, and offer legislative presentations at workshops, conferences, and regional meetings

	4. Represent key issues for MASBO members during legislative sessions.	4a. Continue participation in CAMPS. 4.b. Work to ensure that MASBO's perspective is part of the legislative conversation and decision-making process.
<b>Leadership and Internal Operations</b>  MASBO is led by a strong board of directors and dedicated staff. Our organizational structure, finances and staffing levels support our vision for the future.	1. Maintain committees that are clear, relevant and include board and non-board representatives.	1a. Evaluate and redefine the committee structure. 1b. Invite non-board members to participate in committees.
	2. Ensure adequate staffing.	2a. Regularly review current and future staffing needs.
	3. Assure relevant training is provided to board and staff.	3a. Continue leadership training for board and staff.
	4. Maintain an updated strategic plan.	4a. Board conducts strategic plan review every two years with change of board president.
	5. Maintain and grow the financial stability of MASBO.	5a. Regularly review association financials. 5b. Ensure that decisions made by the association support our long-term financial sustainability.

<p><b>Outreach and Engagement</b></p> <p>MASBO continues to expand its membership by creating awareness of its benefits and actively engaging current members in the organization.</p>	<p>1. Market MASBO to general audiences, members, superintendents and the legislature.</p>	<p>1a. Develop and distributed marketing materials for recruitment.</p> <p>1b. Develop and distribute materials to current members focused on retaining and engaging them.</p>
	<p>2. Review and adapt an annual marketing plan.</p>	<p>2a. Develop a marketing and communication plan.</p> <p>2b. Have the MASBO board review the marketing plan annually.</p>
	<p>3. Assure superintendents, boards and county officials understand MASBO's benefits.</p>	<p>3a. Implement trainings and other communication strategies to build awareness among these groups of the role and importance of business officials.</p>
	<p>4. Identify and reach out to nonmembers consistently.</p>	<p>1a. Association services coordinator reaches out to nonmembers to understand why they haven't joined and to explain MASBO benefits.</p> <p>1b. Mail brochure with benefits of membership to SBO and superintendent.</p>
	<p>5. Assure new members feel welcome.</p>	<p>5a. Regional directors follow up with new members with a personal call or email.</p> <p>5b. Develop opportunities for new member in-person connections.</p>
	<p>6. Provide opportunities for member involvement help assure leadership succession.</p>	<p>6a. Utilize member survey to identify opportunities for involvement. Share survey results with membership.</p> <p>6b. Utilize members to co-present or facilitate meetings at the annual conference.</p> <p>3c. Include members in committee work.</p>
	<p>7. Maintain current scholarships to attend conferences and trainings.</p>	<p>7a. Providing scholarships and travelships as give aways at conferences.</p>