

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

Mission and Strategic Plan (March 2018)

October 2019 Update

Purpose: MASBO is dedicated to training and supporting the people responsible for business operations in Montana schools. Our goal is to enable members to manage the business in order to support education for Montana children.

MISSION: Empower School Business Leaders Through Education

STRATEGIC DIRECTION AND GOALS

CATEGORY	GOALS	OBJECTIVES	STATUS
Programs and Services Professional development opportunities and services are relevant, affordable and accessible.	1. The mentor program is strong and vibrant.		-Rita Huck (VP) and Marie coordinate this. We have 18 mentors that are assigned to 47 new clerks. -Added Mentor-Mentee Breakfast to summer conference schedule in June 2019
	2. The certification program is continued and enhanced.	2a. Certification program includes online training and testing.	Committee has developed power point presentations covering topics in Tests 1 & 2. These can be used to develop online training.
		2b. Consider including trustees and superintendents in certification program.	
	3. Professional development opportunities are relevant and include opportunities for distance learning.	3a. Supplement current training opportunities with webinars and webcasts.	
	4. Members utilize the knowledge and expertise of MASBO's staff.		Denise and Marie field questions from members on a daily basis.
Partnerships MASBO has strong partnerships with key stakeholders including OPI, SAM, MTSBA, county officials and higher education.	1. We have identified our partners and key contacts.		MASBO is actively involved in MT-PEC and MQEC.
	2. Partners participate in board meetings when appropriate.		
	3. Relationships with partners provide additional professional development opportunities and resources for MASBO members.	3a. Work with OPI to update manual and online resources. This includes the accounting manual, elections manual, guidance related to legislative sessions.	Denise has reviewed and commented on these OPI documents: Bus Standards, Chart of Accounts, Understanding MT School Finance, Building Reserve Fund Guidance and Elections Manual. Denise serves on the task force to update the School Accounting Manual.

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		<p>3b. Develop joint trainings beyond MCEL with SAM (i.e. roles w/superintendent, business manager in relation to training for TEAMS and civil rights report and e-grants reports).</p>	<p>- MT-PEC group held Strategic Governance Summit training in August 2018 to leadership teams from 10 school districts.</p> <p>- MASBO/SAM Superintendent/Clerk Finance Summit was held on July 29, 2019 in Helena.</p> <p>-MT-PEC Unified Plan for Professional Development established in May 2019 to be used as a basis for training during FY2020 and beyond.</p>
<p>Advocacy MASBO advocates for its members to the legislature and other government entities. Efforts are strengthened with involvement and/or representatives from school districts of all sizes.</p>	<p>1. The membership is informed of MASBO’s legislative efforts.</p> <p>2. MASBO represents key issues of its members during legislative sessions.</p>	<p>1a. Keep the membership informed on the efforts and plans of the K-12 Vision Group.</p> <p>1b. Review Great Works of Montana’s Public Schools publication at meeting.</p> <p>2a. Discover key issues that are relevant to members.</p> <p>2b. Advocate for business managers to be hired instead of appointed and other key issues.</p>	<p>K-12 Vision Group met in August 2019. Updated document is included in Great Works of Montana’s Public Schools publication. MASBO members are Karsen Drury (Cascade), Carrie Ruff (Bonner), Pat McHugh (Missoula), Lacey Porrovecchio (Bigfork), Donnie McVee (Laurel) and Jenine Syness (Lodge Grass).</p> <p>Great Works Vol. VII to be distributed at MCEL 2019.</p> <p>Usually align MASBO priorities with other groups in MT-PEC.</p>

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Leadership MASBO is led by a strong board of directors and dedicated staff. Our organizational structure and staffing levels support our vision for the future.	1. Committee charters 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.	Payroll and Certification Committees are all non-board members.
	2. Adequate staffing is in place.	2a. Review staffing needs.	
	3. Assure relevant training is provided to board and staff.	3a. Marketing training session for board and staff.	
		3b. Leadership training for board and staff.	Five board members and Denise attended the ASBO Annual Meeting.
	4. A plan is in place for board and staff leadership succession.	4a. Complete conflict of interest form annually.	
	5. Assure the strategic plan is current.		
Marketing and Awareness MASBO is well known. There is good awareness of the benefits MASBO offers its members and school districts around the state.	1. Assure communication materials are available to a general audience, new members, superintendents and the legislature.	1a. Develop a "fact sheet".	
		1b. Develop a brochure.	Draft of new member packet to be reviewed by MASBO board at their October 2019 meeting.
	2. Develop an annual marketing plan.	2a. Develop a marketing and communication plan that includes social media.	MASBO board collaborated with by Amy Falcone (Big Picture Marketing) to develop a 3-year marketing plan and approved by board at their February 2019 meeting.
	3. Assure superintendents understand MASBO's benefits.	3a. Revise and update mission statement.	
4. Utilize social media.	4a. Create a facebook page.	Facebook page created in Spring 2019. Photo albums and events created and posted on a regular basis.	

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<p>Membership Our membership program has grown and expanded. All are invited to volunteer and support our mission.</p>	<p>1. Identify and reach out to non-members consistently.</p>	<p>1a. Reach 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 business manager and superintendent.</p>	
	<p>2. Assure new members feel welcome.</p>	<p>2a. Follow up with new members with a personal call or meeting.</p>	<p>Marie sends an email to new members. Draft new member packet reviewed at Oct. 2019 board meeting.</p>
	<p>3. Opportunities for member involvement help assure leadership succession.</p>	<p>3a. Identify opportunities for member involvement.</p>	<p>Karsen Drury is a new member on the K-12 Vision Group, replacing Betty Brumwell. Kathy Preeshl is working with Maryetta Engle on student activity funds in anticipation of her retirement. Janelle Mickelson served on the negotiated rule-making committee for testing.</p>
		<p>3b. Utilize members to co-present or facilitate meetings at the annual conference.</p>	<p>Spring Regional workshop: Carrie Ruff, Noreen Anderson, TJ Marmon, Toby Wetsch, Dennis Clague Summer conference: Bob Martelle, Mike Waterman, Rebekah Rhoades, Shanna Flores, Cheri Nygard, Kevin Patrick, Maryetta Engle, Jane Knudsen, Cindy Cowan, Rachel Broughton, Deidre Martinko, Mary Breuer, Brian Patrick, Rita Huck, Cindy Foley, Kim Aarstad, Noreen Anderson, Tammy Tulberg, Jen Mettler, Kathy Preeshl, Denise Mason, Liz Thibert, Colleen Drury Budget workshops: Mike Waterman Facilities Planning & Financing: Tyler Ream, Kalli Kind, Scott Brown (all non-MASBO members) New Clerks: Shanna Flores, Noreen Anderson, Lorie Carey, Dennis Clague, Jane Knudsen, Laurie Noonkester, Rita Huck, Ginger Martello, Carrie Ruff Veteran Clerks: Heather Mumby, Mary Lundy, Toby Wetsch, Mike Waterman, Rita Huck, Katie Nordstrom, Jeri Anton, Daniela Walsh</p>

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		3c. Include members in committee work.	Payroll Committee: Brigette Clark, Jane Knudsen, Carrie Ruff, Ginger Martello, Laurie Noonkester, Charlene Aaberg, Jodi Williams Certification Committee: Nicki Beyer, Kathy Preeshl, Maryetta Engle, Sandy Watkins, Kelly Doornek Student Activity Committee: Kathy Preeshl, Maryetta Engle
		3d. Invite interested members to board meetings.	
		4a. Consider providing scholarships and travelships based on need and distance.	
	4. Expand revenue sources including sponsors to provide scholarships.		