

MONTANA ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

Mission and Strategic Plan (March 2018)

October 2018 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
<p>Programs and Services Professional development opportunities and services are relevant, affordable and accessible.</p>	<p>1. The mentor program is strong and vibrant.</p>		<p>Lorie Carey (VP) and Marie coordinate this. We have 16 mentors that are assigned to 25 new clerks.</p>
	<p>2. The certification program is continued and enhanced.</p>	<p>2a. Certification program includes online training and testing.</p>	<p>Committee has developed power point presentations covering topics in Tests 1 & 2. These can be used to develop online training.</p>
		<p>2b. Consider including trustees and superintendents in certification program.</p>	
	<p>3. Professional development opportunities are relevant and include opportunities for distance learning.</p>	<p>3a. Supplement current training opportunities with webinars and webcasts.</p>	
	<p>4. Members utilize the knowledge and expertise of MASBO's staff.</p>		<p>Denise and Marie field questions from members on a daily basis.</p>

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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, and Building Reserve Fund Guidance
		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).	- MT-PEC group held Strategic Governance Summit training in August 2018 to leadership teams from 10 school school districts. - Joint training with superintendents is planned for April 2019 and July 29, 2019.
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.	1. The membership is informed of MASBO's legislative efforts.	1a. Keep the membership informed on the efforts and plans of the K-12 Vision Group.	K-12 Vision Group met in August 2018. Updated document is included in Great Works of Montana's Public Schools publication.
		1b. Review Great Works of Montana's Public Schools publication at meeting.	Great Works Vol. VI to be distributed at MCEL 2018.
	2. MASBO represents key issues of its members during legislative sessions.	2a. Discover key issues that are relevant to members.	Usually align MASBO priorities with other groups in MT-PEC.
		2b. Continue to advocate for business managers to be hired instead of appointed and other key issues.	

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<p>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.</p>	<p>1. Committee charters are clear, relevant and include board and non-board representatives.</p>	<p>1a. Evaluate and redefine the committee structure.</p>	
		<p>1b. Invite non-board members to participate in committees.</p>	<p>Payroll and Certification Committees are all non-board members.</p>
	<p>2. Adequate staffing is in place.</p>	<p>2a. Review staffing needs.</p>	
	<p>3. Assure relevant training is provided to board and staff.</p>	<p>3a. Marketing training session for board and staff.</p>	
		<p>3b. Leadership training for board and staff.</p>	<p>Five board members and Denise attended the ASBO Annual Meeting.</p>
	<p>4. A plan is in place for board and staff leadership succession.</p>	<p>4a. Complete conflict of interest form annually.</p>	
	<p>5. Assure the strategic plan is current.</p>		
<p>Marketing and Awareness MASBO is well known. There is good awareness of the benefits MASBO offers its members and school districts around the state.</p>	<p>1. Assure communication materials are available to a general audience, new members, superintendents and the legislature.</p>	<p>1a. Develop a “fact sheet”.</p>	
		<p>1b. Develop a brochure.</p>	
	<p>2. Develop an annual marketing plan.</p>	<p>2a. Develop a marketing and communication plan that includes social media.</p>	
	<p>3. Assure superintendents understand MASBO’s benefits.</p>	<p>3a. Revise and update mission statement.</p>	
	<p>4. Utilize social media.</p>	<p>4a. Create a facebook page.</p>	

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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>	Marie sends an email to new members.
	<p>3. Opportunities for member involvement help assure leadership succession.</p>	<p>3a. Identify opportunities for member involvement.</p>	
		<p>3b. Utilize members to co-present or facilitate meetings at the annual conference.</p>	<p>Summer conference: Mike Waterman, Rebekah Rhoades, Carrie Ruff, Shanna Flores, Bridget Clark, Charlene AbergLaurie Noonkester, Nicole Beyer, Kathy Preeshl, Sandy Watkins, Kelly Doornek, Maryetta Engle, Ellen Conley, Teresa Cornell, Jane Knudsen, Shari Hurst, Roger Heimbigner, Cindy Cowan, Della Van Horn, Jacki Young Budget workshops: Mike Waterman plus presentations from Kevin Patrick, Pat McHugh, Tina Hill, Brian Patrick, Della Van Horn, Jacki Young, Julie Jones, Ginger Martello New Clerks: Jane Knudsen, Laurie Noonkester, Rita Huck, Ginger Martello, Lorie Carey, Carrie Ruff Veteran Clerks: Mike Waterman</p>
		<p>3c. Include members in committee work.</p>	Certification and Payroll Committee comprised of active members.
		<p>3d. Invite interested members to board meetings.</p>	
	<p>4. Expand revenue sources including sponsorships to provide scholarships.</p>	<p>4a. Consider providing scholarships and travelships based on need and distance.</p>	

