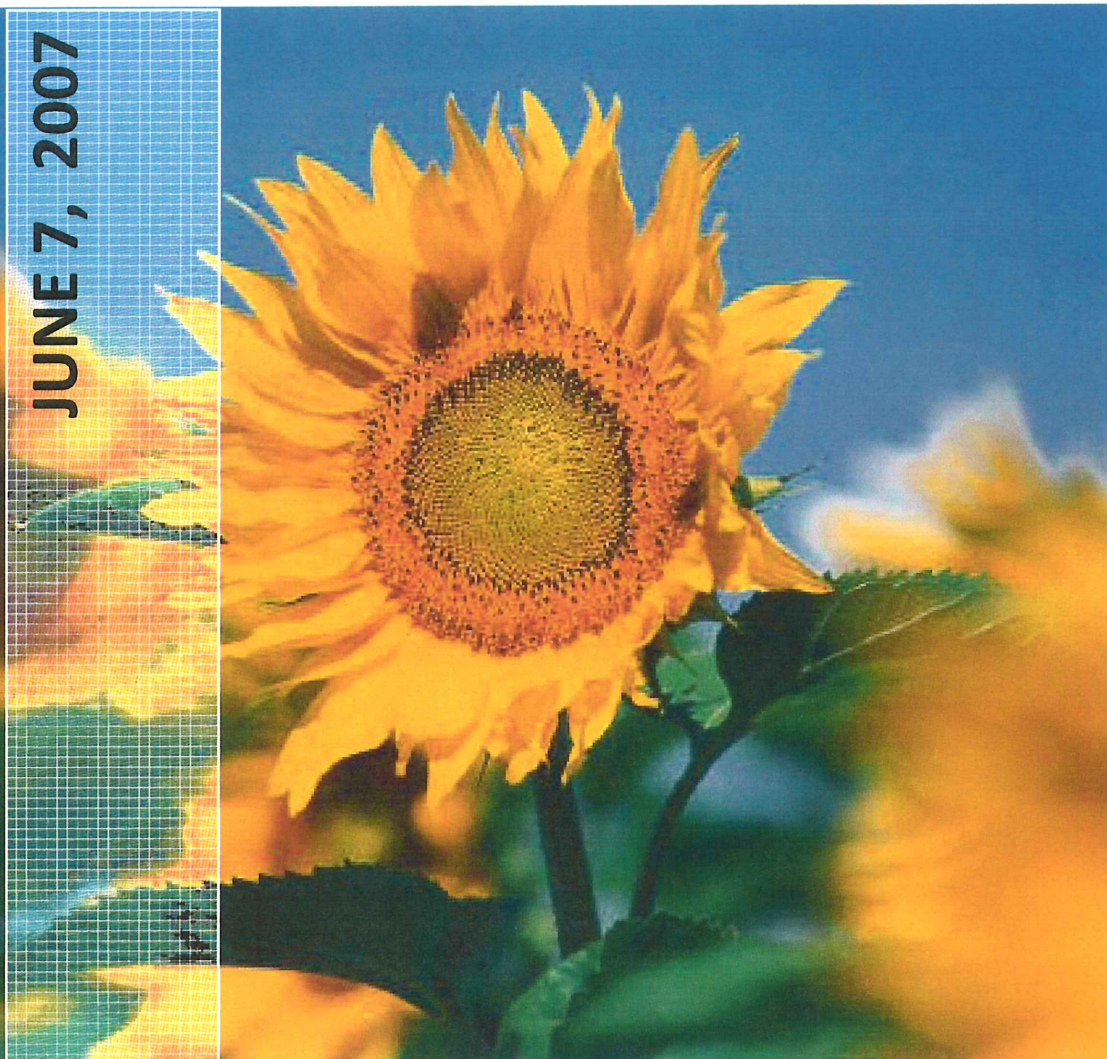


KANSAS ASSOCIATION OF SCHOOL BUSINESS OFFICIALS

STRATEGIC ACTION PLANNING

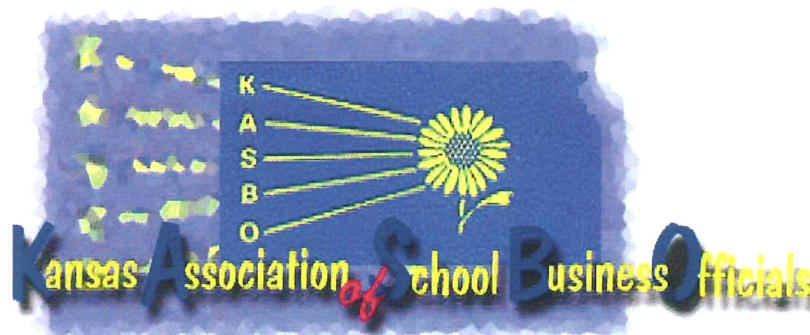
JUNE 7, 2007



KANSAS ASSOCIATION OF SCHOOL BUSINESS
OFFICIALS
STRATEGIC PLANNING SESSION
KASBO BOARD OF DIRECTORS

June 7, 2007
Holiday Inn
Salina, Kansas

Facilitator:
John D. Musso, Executive Director
Association of School Business Officials
International



Preface

The Board of Directors for the Kansas Association of School Business Officials commissioned the development of a strategic plan that would carry them forward for the next three to five years. The Association has been very proactive in providing quality professional development opportunities for its members, but, in recent times, has experienced a decline in membership as well as attendance at workshops and conventions. This is an issue that many associations across the United States are experiencing. KASBO has potentially identified several reasons for the decline, particularly the “Generation X” factor.

The Board came together, setting aside one day to formulate a strategic action plan. With time as a valuable resource, the Board completed various parts of their work prior to meeting. This afforded them the opportunity to maximize the time that they were able to meet face-to-face.

The Board participated in various exercises throughout the day to develop a quality plan, or road map for the next several years. The following represents their work as the committed the resources of people, time and money to this cause. Any and all resources committed were recognized as being an investment in the membership as well as the Association.

The members of the board are to be commended for their forward thinking and commitment to the members of KASBO and the children of the communities they serve.


John D. Musso, RSBA

Executive Director,

ASBO International

Participants each selected five (5) words that would describe KASBO. The following are those results. Many words were identified by more than one participant, but are listed only once. These words were then later used to develop the vision and mission statements.

Words that describe KASBO's purpose

- Leadership
- Educate
- Service
- Encourage
- Learning
- Information Gathering
- Integration
- Mentoring
- Friendship
- Information
- Professional
- Development
- Support
- Fun
- Relationships
- Educational
- Integration
- Enhancement
- Network
- Promote
- Cooperation
- Analyze
- Lobby

Participants were asked to describe KASBO's purpose as they see it. The following represents those statements. These statements were used to help develop the mission statement.

Descriptions of KASBO

- KASBO endeavors to equip its members for leadership in the integration of business and educational goals for every Kansas school. KASBO provides opportunities to network with peers and offers support and enhancement to all areas of job performance through its programs of in-service, workshops and convention.
- KASBO allows members to get together to discuss relevant topics on anything from legislative issues to how systems and procedures are handled. Relationships are built that provide contacts for support.
- KASBO is an organization for school business officials to gather together to share school business knowledge and to receive information from vendors and state and federal officials which will help business officials on a day-to-day basis. KASBO is also a networking organization where members can cultivate relationships with each other.
- KASBO is comprised of a group of school business officials who each have a wide variety of information and are willing to share with everyone for help.
- KASBO provides professional development opportunities for Kansas school district business officials. Through these professional development opportunities, membership has the ability to network with members to discuss common problems and solutions.
- The professional organization for Kansas Business professionals, where all can go to network, gain professional and personal development.
- KASBO is an organization that provides an opportunity for individuals to stay abreast of the current developments in our profession by attending organized sessions and networking with other professionals in the field.
- Organization to promote school business officials role in the education of Kansas students.

Participants were asked this question. Their responses helped them develop goals and objectives later in the session.

Who does KASBO serve?

- School business personnel across the State of Kansas
- School business officials including all business office functions
- All individuals who are responsible for any aspect of the business functions of the school districts, i.e. business managers, superintendents, clerks, etc.
- Kansas kids and school districts throughout the state of Kansas
- The kids first, the membership second
- School district officials including business and finance directors, superintendents, operations directors, purchasing employees, payroll employees, and human resource employees. By serving this group of individuals, it serves school districts and school districts and students across Kansas
- KASBO serves any school district employee that is responsible for business operations within their districts
- All school business officials in Kansas schools

Each participant was asked to list two short term goals that they would like to accomplish during their tenure on the board.

Potential short term goals (short term is defined as two years or less)

- Work effectively with the Board to carry out the goals of KASBO.
- Survey members to ascertain needs and goals as KASBO demographics change.
- Have the board move from an administrative, (manage the bylaws as they are) organization, to a progressive, positive change making team that develops the organization and its goals to serve the changing landscape of our profession
- Expand membership
- Strengthen the mentorship program
- Assess the needs of membership
- Establish a strategic plan to serve as a guiding light for future Boards and leadership
- Leadership become more organized and directional with its goals for the future of KASBO
- Support of our members
- Provide excellent staff development opportunities
- Continue to build the mentorship program to get new clerks, budget administrators off on the right track
- Involve KASBO in KSDE's leadership transition plan
- Help promote SBO's role in school operations
- Promote the use of technology in schools and school operations

Participants were also asked to identify long term goals that they would like to accomplish as a part of their tenure on the board.

Potential long term goals (long term is defined as longer than two years but less than 5)

- Contact school districts not presently participating in KASBO to provide information showing the importance of enhancing school support staff with the tools necessary for optimum job performance.
- Encourage diversity and sensitivity training for all members to attract new members by staying fresh and vibrant in attitudes and practices.
- Revitalize the annual convention
- Expand the pool of future leaders of the organization
- Rethink what we are doing currently as an organization to identify areas of opportunities for continued growth and improvement
- Determine ways to increase membership
- Increase membership
- More involvement by the membership and better quality workshops
- Implement a clear vision for future leadership and their role in that vision
- KASBO should have at least one member from every district in Kansas
- Expand offerings at workshops and annual convention to attract more people
- Continue to build accountability into our budget process to give public the assurance that we are being responsible with their money.

Participants were asked to describe challenges they saw facing KASBO. These challenges helped them identify goals and objectives.

Potential challenges facing KASBO

- Not getting the message across to schools on the benefits of KASBO participation in this time of decreasing budgets
- Sustaining membership
- To much to do and not enough time to get it done
- Financial, to do what we want to do for our membership and still be affordable for our members to belong in this time of tightening budgets.
- Being able to meet all the needs of all member districts
- Help members stay current on current laws and regulations
- Transition plan for KSDE
- Declining membership and attendance at convention
- Retirements will cause huge holes in the organization in leadership and attendance
- KASBO is the best kept secret in Kansas education
- We need to investigate new ways to market the organization
- Changing the scope of the organization and its membership fees, by laws, and corporate development to continue to grow membership, revenue and conference attendance
- Getting out of our own way
- Diminishing financial resources of schools
- Travel time and costs

Definitions

- **Vision = What we are going to do**
- **Mission=Why are we here**
- **Core Values = Why we do what we do**
- **An organization is vision-focused and values-driven**

A mission statement is a brief description of a company's fundamental purpose. A mission statement answers the question, "Why do we exist?"

The mission statement articulates the organization's purpose both for those in the organization and for the public.

The difference between a mission statement and a vision statement is that a mission statement focuses on a company's present state while a vision statement focuses on a company's future.

Every organization should have a mission statement, both as a way of ensuring that everyone in the organization is "on the same page" and to serve as a baseline for effective planning.

A vision statement is sometimes called a picture of your organization in the future but it's so much more than that. Your vision statement is your inspiration, the framework for all your strategic planning. The vision statement answers the question, "Where do we want to go?"

What you are doing when creating a vision statement is articulating your dreams and hopes for your business. It reminds you of what you are trying to build.

While a vision statement doesn't tell you how you're going to get there, it does set the direction for your planning. That's why it's important when crafting a vision statement to let your imagination go and dare to dream – and why it's important that a vision statement captures your passion.

When writing a vision statement, your mission statement can be a valuable starting point for articulating your values.

CORE IDEOLOGY

*Core ideology describes an association's consistent identity that transcends all changes related to its relevant environment. It consists of two elements - **core purpose** – the association's reason for being – and **core values** – essential and enduring principles that guide an association.*

Core Purpose:

TO SUPPORT THE KANSAS SCHOOL BUSINESS PROFESSION BY PROVIDING INFORMATION AND CREATING OPPORTUNITIES FOR HSARING KNOWLEDGE.

Core Organizational Values (not in priority order):

1. Provide the profession with:
 - a. Quality networking
 - b. Diverse learning
 - c. Life-long learning
 - d. Relevant professional and personal development
 - e. Have fun
2. Focus on best business practices
3. Provide accurate and meaningful school information
4. Accountability to community
5. Excellence in education for all Kansas students
6. Value honesty and integrity
7. Value resource sharing formal and informal

Envisioned Future

VISION STATEMENT (Big Hairy Audacious Goal BHAG)

KASBO will be recognized as the leading authority for the school business community.

MISSION STATEMENT

To equip the membership for leadership in the integration of business and educational goals for every Kansas student.

The following thinking represents goal areas for the next three to five years. They are areas in which KASBO will explicitly state the conditions or attributes it wants to achieve. These outcome statements define "what will constitute future success." The achievement of each goal will move the association toward realization of its vision. The goal areas are not in priority order.

Objectives and Strategies provide direction and actions on how the association will accomplish its articulated goals. Strategic Objectives are considered in the 3-5 year planning horizon while Strategies are considered within the 1-3 year planning horizon. Strategies are reviewed annually by the KASBO leadership.

GOALS

Goal Area: Membership

Objective (1): Increase membership

Objective (2): Retain membership

Goal Area: Expand professional development opportunity offerings

Objective (1): Increase participation at professional development activities

Goal Area: Marketing & Communications

Objective (1): Increase and expand KASBO's exposure throughout Kansas and clearly define its image

Culmination

The session ended with the Board of Directors identifying key components for the Strategic Plan that included Goals and Objectives. The Board was urged, and agreed that the goals should not exceed three in number. Although the strategic plan was new in nature, the concept was not. Understanding this, three goals would be a very aggressive venture.

The next steps for the Board are to identify strategies in which they plan to accomplish the goals and objectives that have been identified. They have also committed to annual review and evaluation of each goal and objective. This continuous evaluation model should ensure success of the plan.
