

MASSACHUSETTS ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS



Strategic Plan

2013 - 2018



2013-18 Strategic Plan Committee

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EXECUTIVE SUMMARY

This document represents the strategic plan for the Massachusetts Association of School Business Officials (MASBO) for the period 2013 to 2018. MASBO initiated its first long range strategic plan in 2002 and, since that time, has engaged in a thorough strategic planning process every five years. This is the third strategic plan for MASBO.

Strategic planning is a process for creating an organization's preferred future. It is a long-range planning process for organizational growth, renewal, and transformation. The plan provides a framework for improving programs, management functions, and evaluation of an organization's progress.

Strategic planning helps organizations think and act strategically, clarify future directions, establish priorities, develop effective goals and objectives, improve organizational performance, build teamwork, and deal effectively with a rapidly changing environment.

Our strategic planning process involved a series of steps including:

- Analyzing relevant internal and external opportunities and challenges and their implications for the organization;
- Assessing the organizations areas of strength and areas for improvement;
- Revising the organizations mission and vision to better reflect the current environment and status;
- Soliciting feedback from members regarding the strategic initiatives, goals and objectives that the organization should pursue;
- Establishing strategic goals and objectives to move the organization to where it wants to be; and
- Communicating the organizations mission, vision, goals and objectives to all members and stakeholders.

Organizations implement strategic planning to effectively deal with change in a proactive rather than reactive manner by establishing a common purpose, a sense of direction, priorities for change, and a blueprint for action.

This strategic plan document outlines the methodology used in the strategic planning process, reviews the accomplishments of the organization resulting from the previous strategic plan, outlines the strengths and weaknesses as well as opportunities and threats to the organization as identified by the membership, and presents the strategic goals and objectives for the organization developed based on the extensive feedback from our members.

It is with great pride that the members of the Strategic Planning Committee present the MASBO Strategic Plan for 2013-2018.

MISSION, VISION, AND GUIDING BELIEFS

Mission Statement

The Massachusetts Association of School Business Officials exists to enhance the competence and knowledge of School Business Officials in Massachusetts by providing exceptional leadership, professional development and support services to members to enable them to perform the responsibilities of their positions to the highest standards of the profession and maximize their contribution to the success of students and public education in the Commonwealth.

Vision Statement

MASBO shall be the recognized leader in providing high quality professional development in support of the school business profession and school finance operations. Professional development will be structured, differentiated, and guided by a curriculum that will ensure that all School Business Officials have the skills and knowledge needed to meet or exceed professional performance standards. Such professional development shall be delivered through a variety of convenient methods and shall allow for the proper recognition and credentialing of the School Business Official.

MASBO shall be the primary vehicle through which School Business Officials collaborate with one another and share solutions, ideas, best practices, and experiences. MASBO will utilize modern methods, including state of the art technology, to facilitate the timely dissemination of information that allows for well-informed decision-making and strategic action by members. MASBO shall be the principal virtual and in-person business and operations consulting service provider to Massachusetts school districts.

MASBO shall be the recognized expert in budget development, reporting, and evaluating resource allocation; identifying the most cost effective and efficient use of resources; and optimizing service delivery to ensure that maximum resources are available for the core mission of members' school districts. MASBO shall provide resources that enhance transparency and accountability in budgeting and reporting thereby promoting trust and credibility in the school business profession.

MASBO, through its strong relationships with key partner organizations in Massachusetts, shall be one of the most influential sponsors of important educational research leading to impactful legislative proposals which are consistent with MASBO's mission and positively impact public education in Massachusetts. MASBO shall be instrumental in the successful passage of key legislative proposals that benefit members, members' districts, and/or students in the members' districts.

MASBO shall provide a thoughtful, meaningful, and innovative system of recognition of valuable service and contribution of members that enhances the value of the MASBO experience for members. Awards and recognition granted by MASBO to its members shall be regarded with the highest esteem by all those involved in the field of public education in the Commonwealth.

Guiding Beliefs

- We believe School Business Officials shall perform their duties consistent with the highest ethical standards.
- We believe that professional development is critical to the effectiveness of School Business Officials.
- We believe that high standards and sound, consistent practices for School Business Officials are important to their success.
- We believe communication among School Business Officials is vitally important.
- We believe technology is an integral tool in the functions of School Business Officials.
- We believe the involvement of School Business Officials in MASBO activities is essential to the success of the organization.
- We believe MASBO's pro-active involvement in the legislative process will result in more effective delivery of educational services.
- We believe that the formulation of partnerships with professional, state, regional, and national organizations enhances the effectiveness of the organization.

STRATEGIC PLANNING METHODOLOGY

Our strategic plan is critical to directing the activities of our organization over the next five years. As such, it was very important that we solicited and received as much member feedback as possible. Input from members was collected through a number of activities including:

1. MASBO's Annual Demographic and Performance Survey

As part of our annual performance survey, a number of questions were included to solicit member input on our organization's strengths, areas for improvement, and strategic opportunities and initiatives the organization should pursue in the future. Over 70% of our members responded to this survey.

2. Annual Institute Feedback Cards

During the Annual Institute, all attendees received index cards and were asked to respond to two key questions:

1. What are the three greatest challenges you believe you will face as a School Business Official over the next several years?
2. What can MASBO do to assist you in dealing with those challenges?

We received 120 responses to this request for feedback.

3. Member Focus Groups

Focus groups provide a more informal means of obtaining input from members and allow for more in depth discussion of strategic opportunities. As part of this strategic planning process, we held eight focus group sessions including one held as part of the NEASBO Leadership Academy, one at the MASBO September 2011 Bi-Monthly, and a vendor focus group that was conducted during the 2011 Fall Institute. In addition, focus groups were conducted as part of five different regional roundtable meetings.

In total, over 70 members participated in one of the eight focus group sessions offered. The discussions that took place during these meetings were very informative and provided the committee with excellent insights into members' thoughts about the organizations strategic goals and future initiatives.

4. Validation Survey

With all of the different opportunities for participation provided, and given the number of members who participated, the committee felt that the input we received was a strong representation of our entire membership and captured the essential elements shared by all. In order to verify our assumption, however, the

committee developed and issued a validation survey that helped us to further refine and define those strategic goals and objectives that are the highest priority for our members. These survey results provided us with the consensus needed to determine the seven most important strategic goals for the organization over the next five years.

CURRENT STATE OF AFFAIRS

The Massachusetts Association of School Business Officials (MASBO) is a non-profit, private 501c(3) organization consisting of School Business Officials from over 90% of the school districts and regional schools in the Commonwealth of Massachusetts. MASBO was established in 1957 and has been providing education and key resources to School Business Officials for 54 years.

Accomplishments

The 2007-2012 Strategic Plan outlined six strategic goals. Over the last five years, many of the specific objectives have been met. Below is a list of these strategic goals as well as a number of notable accomplishments in each area.

1. To strengthen the organization by increasing membership, establishing partnerships, and expanding school business officials' involvement
 - a. MASBO has grown over the last five years, and now represents over 92% of the operating districts in the Commonwealth. We now also have members representing a number of charter schools and education collaboratives in the state.
 - b. MASBO has partnered with the Massachusetts Association of School Superintendents, the Massachusetts Association of School Committees, and other education organizations in the Commonwealth. These partnerships have produced successful results in the areas of legislative advocacy, high quality joint professional development offerings, and impactful research studies on topics such as dropout prevention and educational funding in Massachusetts.
2. To develop and disseminate model school business practices
 - a. MASBO members developed a model budget document and a model financial reporting template to serve as a guide for Massachusetts schools.
 - b. MASBO has developed a number of outstanding consulting services for members including the District Financial Review, the District Transportation Review, and the Analysis of Compensation and Benefits Program. Over 75 school districts have taken advantage of these services over the last several years.

3. To provide relevant and effective professional development opportunities for School Business Officials
 - a. MASBO has developed and implemented an outstanding DESE approved Licensure Program for School Business Officials. Over the past five years, over 110 individuals have obtained DESE licensure through participation in this program. As a direct result of this program, the percentage of MASBO members who are licensed has increased from approximately 45% in 2007 to 71% in 2011.
 - b. Five years ago, MASBO offered the first ever New England ASBO Leadership Academy. The focus of this event has been to bring in regional or nationally recognized speakers to address topics geared toward building the leadership capacity of our members and to provide opportunities for members from New England states to network with each other.
 - c. Two years ago, MASBO began offering workshop sessions to meet the educational needs of Business Office Support staff including workshops on payroll, accounts payable, and grants management. This effort has led to the recent development and implementation of a formal certification program for Business Office Support staff that addresses eight key functional areas through 24 hours of contact time over a two year period. When the invitation for the first cohort of 20 was extended, the program was fully enrolled in less than three days.
4. To develop a fully functional, bi-directional medium of communication
 - a. Through the efforts of our Executive Director and a strong Legislative Committee, MASBO is now recognized as an important partner in the legislative arena and has seen a significant increase in its involvement in educational advocacy. MASBO is now commonly invited to participate in the development of and dialogue regarding key pieces of legislation regarding the education of children in the Commonwealth.
 - b. Over the last two years, MASBO has developed and recently launched a new website for its members. This web platform provides members with a number of tools and resources that will enable improved bi-directional communication and on-line collaboration.
5. To develop a recruiting program for “Future” School Business Administrators.

As mentioned above, MASBO has developed and implemented a highly successful SBA Licensure Program which has graduated over 110 individuals. This program has enticed a number of individuals with private sector experience to consider a career in School Business

Administration and has served as an effective recruiting tool for new School Business Officials.

6. To explore the purchasing of an office property for MASBO to establish a resource center.

Over the last several years, MASBO has been able to achieve an excellent financial position with over \$50,000 in retained earnings. This has positioned the organization to be able to give strong consideration to the acquisition of property. Action on this goal is still under consideration.

Strengths and Weaknesses

Our members identified the following as the greatest strengths of the organization:

- Highly effective professional development offerings
- Highly effective licensure program
- Strong membership representing over 90% of all districts
- Engaged membership with attendance at a majority of MASBO events
- Highly effective networking opportunities provided
- Frequent and effective communication with members
- Strong relationships with DESE, MASS, MASC, and other organizations
- Cost-effective and high quality distance learning opportunities offered
- Programs which recognize the achievement of members, vendors, and other supporters

Our members identified the following as areas for improvement:

- Increase participation of members on committees and boards
- Increase awareness of Financial and Transportation Review Programs
- Provide more effective means to solicit input on professional development topics
- Increase number of best practice documents available to members
- Consistently address school business essentials or fundamentals
- Develop an outreach program to attract new School Business Officials to the field and continue to increase number of licensed School Business Officials
- Increase awareness regarding MASBO's legislative activities

Opportunities and Threats

The following opportunities were identified by members as being most significant over the planning horizon:

- Reforming Chapter 70 and the Foundation formula

- Increasing number of School Business Official vacancies with retirement of veteran School Business Officials
- Availability of increasingly valuable technology tools and resources
- Increasing participation and effectiveness of regional roundtables
- Use of vendors to help educate members
- Development of School Business Official evaluation tool
- Continued need for classified personnel training and certification
- Desire for advanced peer mentoring or professional coaching for existing members

The following threats were identified as areas that MASBO will need to work to limit the organizations exposure or vulnerability:

- Turnover and loss of “institutional” expertise of veteran members
- Organizational continuity and viability with potential staff retirements
- Impact of budget constraints on ability of members to maintain membership in the organization
- Stagnant economy leading to calls for increased regionalization or consolidation
- Other organizations or vehicles duplicating, or attempting to duplicate, the services that MASBO provides

STRATEGIC GOALS AND OBJECTIVES

- 1. Enrich professional development offerings and opportunities to ensure that they are relevant, timely, accessible, appropriately differentiated, and result in mastery of the school business profession**
 - a. Develop a comprehensive curriculum cycle to ensure regular and consistent review of all school business fundamentals
 - b. Develop a professional development committee that liaisons with the Board of Directors and staff regarding professional development offerings and delivery
 - c. Identify and implement strategies to more effectively capture and utilize the expertise of our more veteran or retired members in providing professional development to members
 - d. Identify and implement strategies to better differentiate professional development and training opportunities by experience level, district size and type, and location
 - e. Create a partnership with area college(s) or university(ies) to provide graduate courses relevant to School Business Officials or to obtain graduate credits for certain professional development offerings

- 2. Develop, disseminate and deliver innovative resources and services to improve the quality and efficiency of school business operations in member districts**
 - a. Develop a Sample School Business Operations Manual or Best Practices Guide that districts can use as a template for their own district's operations guide
 - b. Create and implement a peer coaching or advanced mentoring program for School Business Officials who need or desire specific functional area knowledge or skills or a directory of "functional experts" that members can contact for assistance with particular areas
 - c. Improve awareness of and enhance existing consultative services offered by MASBO (Financial Operations Review, Transportation Review, ABC Program) and look to develop similar service(s) that help districts to save money or utilize resources more effectively
 - d. Collaborate with other organizations or agencies to develop innovative database and data analysis tools and resources to allow members to more easily compare performance measures and benchmarks with other districts in the Commonwealth

- 3. Ensure that Massachusetts school districts have adequate funding to provide a high quality education to students of the Commonwealth and make the most effective and efficient use of district resources**

- a. Advocate for changes to the Foundation Budget and Chapter 70 to reflect the true cost of educating children and to guarantee adequate funding for all districts in the Commonwealth
- b. Educate members on how to analyze resource allocation in their school districts, compare resource use and allocation across districts, and determine how to reallocate resources to ensure their most effective and efficient use
- c. Develop a means for districts to easily share cost containment and cost savings methods with one another, as well as the analysis tools used to evaluate these methods and strategies for implementation
- d. Educate members on ways to improve budget transparency and to better communicate and market budgets to stakeholders
- e. Research and share with members how educational technology can be utilized to provide equal or better education service delivery with the same or fewer dollars

4. Enhance efforts to market our organization and develop more strategic partnerships to ensure the organization plays a prominent role in critical decision making and advocacy at the state and national level

- a. Develop and implement a more effective means of regular communication with members regarding important legislative proposals and MASBO's legislative initiatives and advocacy efforts, and a tool to allow members to more easily participate in advocacy efforts
- b. Engage in several innovative and collaborative advocacy, research, or professional development efforts with other organizational partners in the Commonwealth (e.g. MASS, MASC, MGFOA, DESE, DOR, MMA, Mass Budget and Policy Center, etc.)
- c. Identify method(s) to solicit and obtain nominations for award programs that recognize exemplary work and best practices from both within and outside the organization and to better publicize those programs and award winners
- d. Participate in the development and implementation of the School Business Official evaluation standards and rubrics and play a lead role in the regular monitoring, review and revision of the standards and criteria for evaluation

5. Fully leverage modern technology tools to enhance member communication, collaboration, and education

- a. Allocate sufficient funding and/or staff time to ensure that the MASBO website is updated regularly, is more dynamic and current, and is the principal source of communication with and among members
- b. Increase number and types of distance learning opportunities (e.g. webinars, podcasts, videos, simulcasts, etc.) available to members

- c. Develop an electronic resource center on the MASBO website that all members can quickly and easily contribute to and access
- d. Make Web 2.0 tools (blogs, wikis, podcasts, social networking, etc.) for communication and collaboration available through the MASBO website and educate members on their use
- e. Allow for electronic registration for meetings and conferences, electronic distribution of meeting/conference materials to members, and electronic self-service portal for PDP tracking

6. Safeguard the continued viability of the organization by expanding membership and ensuring appropriate funding, staffing, and member involvement

- a. Gather information and determine appropriate and preferred ways for strengthening the relationship between regional roundtables and MASBO and increasing the value or service of roundtables to members
- b. MASBO Board will examine current structures, staffing, funding, and property situation to determine if they are adequate to ensure the long term viability of the organization and to address future anticipated needs and objectives
- c. Increase retained earnings as a percentage of operating revenues to stabilize or reduce dues and stabilize potential fluctuations in revenues and administrative expenses
- d. Increase number of members representing private schools, charter schools, education collaboratives, and other non-traditional operating entities.

7. Promote effective and appropriate relationships and partnerships between MASBO members and vendors

- a. Create a vendor advisory committee to liaison with the Board of Directors on ideas or concerns specific to vendor affiliates
- b. Create a vendor resource library on the MASBO website where vendors can post webcasts, podcasts, articles, position papers, etc. that might be useful to MASBO members
- c. Create an electronic buyers guide for members to easily access information on vendor products and services
- d. Develop a sponsorship “menu” of opportunities allowing for packages or bundled sponsorship options for all or multiple events as well as more flexible options such as individual events