

Policies & Procedures

Adopted by the Board of Directors

March 19, 2026

Introduction

This manual contains the policies governing the structure, organization, operations, programs, and services of the Washington Association of School Business Officials (WASBO). (Bylaw reference, [Article 1, Section 1](#))

These policies include, but are not limited to, WASBO's Constitution and Bylaws as adopted by the WASBO membership and policies adopted by WASBO's Board of Directors to guide the Board's activities and the work of WASBO staff. The policy manual does not repeat requirements specified in the bylaws. The reader is advised to consult both the bylaws and policy manual for a complete compilation of WASBO's operating principles.

The Board of Directors authorized the preparation of this manual and has provided for its ongoing maintenance in order to give members of the Board and WASBO staff easy access to all policies of WASBO and thus make possible greater efficiency in all areas of WASBO activity.

A copy of the manual in the WASBO office will be made available to any WASBO member for reference.

Terminology: The word "Board," capitalized, refers to the Board of Directors of WASBO. To avoid problems with wording, the masculine pronoun has been used to refer to both sexes.

Preface

The purpose of the WASBO Board of Directors, hereafter referred to as the Board, is to conduct the business of WASBO as prescribed by the Bylaws. Our goal in developing and adopting policy is to provide quality in-service programs that provide equal professional growth opportunities to all the membership and to develop and maintain a leadership role with school districts, educational organizations, and the public regarding information and future directions of school business operations. In developing and implementing these policies, we seek the cooperative effort of our membership and the educational community.

Philosophy

It is the philosophy of WASBO to provide opportunities for professional growth and exchange of information for persons involved and/or interested in school business operations.

Continuing education and networking for all will provide members with the tools to assist in better utilization of resources to provide the best education for young people. We believe this can only be accomplished when every employee continues to grow professionally in skills and understanding while maintaining a high level of professional integrity.

Further, to provide quality educational programs with the best utilization of resources, decisions must be made at all levels—school district, public, Legislature—based upon sound information, and the

community of school business officials is best equipped to provide this service to the educational community.

To that end, WASBO shall endeavor to cooperatively provide opportunities for in-service training, professional networking, and sharing of information while promoting the highest standards of professional ethics.

Relationship to Bylaws

Any Board action and staff performance shall be in compliance with the Articles of Incorporation and the [Bylaws](#) of the Washington Association of School Business Officials.

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Chapter One: Governance

1.0 Association

1.01 Bylaws

WASBO functions by the intent of the [Bylaws](#), which enumerate the organizational tenets of WASBO. Any Board actions and staff performance shall follow the Articles of the Bylaws.

1.02 Mission Statement

The Board will annually review the WASBO [mission statement](#).

1.03 Strategic Plan

The Board shall review the [strategic plan](#) annually and revise as needed. The plan will contain short- and long-term goals. The plan shall be available to the membership via WASBO's website.

1.04 Membership

To coincide with the Fiscal Year, the membership year shall be from July 1 through June 30. Membership fees will not be pro-rated. Memberships are non-transferable and non-refundable. (Bylaw reference, [Article 1, Section IV](#))

Any member who ceases employment in school business administration and operations prior to June 30th shall be a member unless the member notifies WASBO otherwise. If said member is an officer other than the president-elect, the member must express his/her interest in remaining through the term of office. The Board may approve this request or appoint another active member. (Bylaw reference, [Article III, Article V, Section 2](#))

1.05 Regions and Regional Directors

For organizational purposes, WASBO is divided into nine regions. A director who is an active member shall represent each region. Each director is elected by the membership at the Annual Conference. The term of office is three (3) years from the date of election. (Bylaw reference, [Article V, Section 1](#))

1.06 Membership Meetings

The only meeting of the membership at which WASBO business is transacted is the Annual Conference, held at a time and location determined by the Board. In the event of an emergency, the Board may call a special meeting of the membership by providing written or electronic notice to the membership at least 10 days in advance of such a meeting. The Board shall conduct WASBO business when the Annual Conference is not in session. (Bylaw reference, [Article VIII](#))

1.07 Non-Discrimination

WASBO will adhere to a policy of nondiscrimination on the basis of religion, race, color, sex, national background, age, disability status, sexual orientation, and political affiliation in all of its programs and practices.

1.08 Awards

The John Jenft Outstanding Service to K-12 Education Award may be presented by the Board to any WASBO member (except current Board members) who has provided extended, significant service to WASBO and to the advancement of school business administration in Washington State and who is of good moral character and who has shown professional integrity throughout their career. This award will be presented at the Annual Conference. (Bylaw reference, [Article V, Section 5](#))

The Board may present an Award of Merit at the Annual Conference to any WASBO member who has done an outstanding job assisting WASBO in the previous year.

The Executive Director may award Unsung Hero Awards to members at the Annual Conference.

Members who qualify for Professional Recognition status (Certified School Business Administrator, Certified School Business Official, and Certified School Business Specialist) will receive recognition at the Annual Conference.

The Risk Management Committee may award the Cindy Acosta Award annually in the spring to any WASBO member who has made a significant contribution to the risk management profession in school districts. The award will include a plaque and cash award in the amount of two-hundred dollars (\$200); which was established by the Acosta family. WASBO will maintain a principal amount determined by the Acosta family in a certificate of deposit (CD).

1.09 Educational Organizations

WASBO will work closely with other educational organizations to further common goals, purposes, and legislative objectives.

1.10 Governmental Entities

The Executive Director will represent WASBO, or see that WASBO is represented, before the Legislature and various state agencies and commissions whose decisions have an effect on local schools.

1.11 Other Organizations (Not Educational Organizations)

WASBO will cooperate with other groups and organizations—civic, fraternal, business, professional, etc.—to further goals of mutual interest.

1.12 Fostering a Culture of Belonging

Purpose:

This policy affirms the Washington Association of School Business Officials' (WASBO) commitment to fostering an environment where all members feel they belong. By embedding principles of belonging into our practices, we aim to ensure every individual is seen, heard, valued, and supported, laying a foundation for a thriving, inclusive community.

Policy Statement:

WASBO is dedicated to creating a culture of belonging that builds upon traditional notions of diversity. We prioritize creating spaces where individuals feel emotionally connected, supported in their roles, empowered to contribute authentically, and proud to be a part of the organizational community.

Core Principles:

1. Welcoming Environment:

- We welcome all members, staff, and partners with openness, striving to create an inclusive space where individuals can bring their authentic selves.
- Programs and communications will promote positivity, mutual respect, and shared purpose.

2. Representation and Equity:

- Our leadership and membership shall reflect the breadth of geographic, professional, and cultural diversity within our field.
- We aim to meet the varying needs of our members equitably, recognizing that equitable treatment differs from equal treatment.

3. Continuous Engagement and Feedback:

- We actively seek input from members to identify and address barriers to inclusion.

4. Empowerment Through Belonging:

- Members will be encouraged to influence organizational decisions through active participation in programs, committees, and leadership roles.
- Training on belonging and inclusion will be integrated into board onboarding.

Implementation Strategies:

• Membership Engagement:

- Regular surveys and community forums will be conducted to gauge belonging and gather actionable insights.
- Scholarships and targeted outreach programs will expand access to underrepresented groups.

• Leadership Accountability:

- Board directors, WASBO Staff, and other WASBO leaders will act as role models, embodying the values of belonging and accountability.
- Metrics such as regional or professional representation and engagement scores will guide organizational growth.

• Accessibility and Inclusion:

- Events, materials, and platforms will be designed with universal accessibility in mind.
- Efforts will be made to ensure that all members, regardless of location or ability, can fully participate in organizational activities.

Monitoring and Evaluation:

This policy will be reviewed annually to ensure alignment with our evolving community needs and to measure the impact of belonging initiatives. A standing committee or task force on belonging will oversee its implementation and updates.

1.1 Board of Directors

1.101 Director/Officer Vacancy

Vacancies shall be filled according to the Bylaws. ([Bylaw reference, Article V, Section 2c](#))

1.102 Board Meetings

The Board will hold a minimum of six (6) meetings per year, to include one meeting at the Annual Conference, to conduct the necessary business of WASBO. The Board may hold other meetings as necessary, including executive sessions. ([Bylaw references, Article VIII, Sections 2 and 3](#))

The Executive Board; President, President-Elect, Past President and Executive Director; will determine the dates, times, and locations of the regular meetings. This schedule will be given to the Board Members.

The Executive Director will be responsible for meeting notification, agenda distribution, and all meeting arrangements.

Except in emergencies, the Board shall not decide upon any question before examining and evaluating information any person requests the Board to consider. The Executive Director shall be given the opportunity to examine and to evaluate all such information and to recommend action before the Board decides.

Members of the Board shall notify the President and/or Executive Director prior to the meeting if that member plans to submit information on a specific agenda item.

The Executive Director shall attend all Board meetings and executive sessions unless excused by the President. Other staff members will attend meetings and/or executive sessions only upon a request by the President.

The President or any three (3) Board members may request an executive session at any time during a Board meeting.

Absence of any Board member from two (2) consecutive meetings of the Board, unless excused on account of sickness or otherwise authorized by the Board, shall be sufficient cause for the members of the Board to declare that such Board member position is vacated.

1.103 Board Agenda

The Executive Director, in consultation with the President, shall prepare an agenda for each meeting of the Board.

Background material on items to be considered at the meeting shall be disseminated with the agenda at least five (5) business days prior to the meeting.

Additional materials concerning the business and operation of WASBO may be sent to the Board periodically between the regularly scheduled meetings, as determined by the President and/or Executive Director.

1.104 Minutes

The Secretary-Treasurer shall be responsible for the minutes of all Board meetings. The Board may designate another Board member or an employee of WASBO to record the minutes.

The Secretary-Treasurer or designee shall provide a copy of the minutes to the President and Executive Director prior to distribution to the Board. After the minutes have been reviewed, they will be included as an agenda item for the next regularly scheduled meeting. The Board shall act on the minutes of the previous meeting at the next regularly scheduled meeting by approval as presented or approval as amended. The minutes stand as the official action of the Board on all items that come before the Board. (Bylaw reference, [Article IV, Section 3d](#))

1.105 Networking Groups, Committees and Boards

The President will appoint and perpetuate standing networking groups. (Bylaw reference, [Article VII, Section 1](#))

It shall be the responsibility of the Board to select chair and co-chair for each networking group. The Executive Director shall be notified of the name(s) of the networking chair(s) by March 1 each year for subsequent approval by the Board at the March Board meeting.

Networking group chairs will attend a networking group orientation training. No individual shall serve as Chairperson for more than two (2) full consecutive terms on the same committee without Board approval.

At the annual board retreat, Board Members will be appointed by the President as liaisons to the networking groups.

The President shall serve on the [Certification Governance Board](#) (CGB). The Certification Governance Board may recommend candidates for membership to the Board for approval. (Bylaw reference, [Article VI, Section 2b](#))

The Board shall appoint or recommend WASBO representatives to external boards or committees.

The President may appoint special committees or task forces as may be necessary. (Bylaw reference, [Article IV, Section 3a](#)). The Executive Director will evaluate the requests of members or other people to serve on committees, including but not limited to the Conference Committee, and determine which interested individuals will be selected to participate. The Executive Director may reject the request of a member or other person to participate on a committee, or remove such an individual from a committee, upon a determination that it would be in the best interests of WASBO. In making that determination, the Executive Director may consider the following nonexclusive factors: whether the individual has violated the WASBO Code of Ethics stated in the Bylaws; and whether the individual has been terminated from employment by WASBO, a school district, or an educational service district due to misconduct.

A. Expenses

Travel, lodging, and meal expenses are the responsibility of the individual and/or district except as follows:

1. Networking group chairs may petition the President in writing for travel funds for any of the following:
 - a. Networking group chair/co-chair to attend one meeting per year on the opposite side of the state from which the individual lives if there is an active group or an activity scheduled that requires attendance and/or direction.
 - b. If the chair/co-chair's district cannot assume the cost of travel to regional meetings and/or workshops and the committee is active with strong participation, goals, and results and the chair's absence would hinder the program. This option is applicable only if a replacement chair/co-chair cannot be located to adequately replace/assist the current leadership.

Board of Directors

Members of the Board of Directors serve without compensation. As part of WASBO's appreciation for their service, active Board members may be entitled to the following:

1. Complimentary enrollment in any WASBO workshop or on-demand learning badge This does not include the annual Business Managers Conference (BMC) or Curriculum Classes.
2. Complimentary registration for the WASBO Annual Conference.
3. Hotel rooms will be provided for board meetings and during the week of the annual conference. Travel arrangements will be paid directly by WASBO when flying and on a reimbursement basis when driving. Meals are also included when in travel status.
4. The Board President will be able to invite their immediate family to the conference at the expense of WASBO.
5. Up to thirty (30) clock hours per year for Board service will be awarded annually in May for time spent on WASBO Board-related activities.
6. Membership dues for WASBO and ASBO International shall be paid to all Board members upon request.
7. Registration, lodging, meals and transportation shall be paid for the current President, Past- President, President-Elect, and/or a Board Member designee for attendance at the ASBO International Annual Conference and ASBO's annual Executive Leadership Forum.

Networking Group Chairs / Co-Chairs

Members serving in the role of Chair or Co-Chair also serve without compensation. In appreciation for their service, they shall be entitled to the following benefits:

1. Complimentary enrollment in one (1) workshop of choice throughout the year.
2. A 50% discount on registration fees for any second workshop of choice throughout the year.
3. One complimentary registration fee enrollment (excludes membership fee) for the WASBO Annual Conference for the networking group chair or co-chair; to be determined by the networking group chair. This benefit applies to the most senior co-chair, as only such benefit shall be available to one networking group leader per year.
4. Up to thirty (30) clock hours per year for networking group service may be available for the networking chair and co-chair. The WASBO Professional Learning Specialist will keep track of the hours worked and automatically add to the networking chair and co-chairs professional transcript each May, immediately following the annual conference when their current term expires.

1.106 Publications

All written, audio, and visual materials developed by networking groups and/or WASBO members and intended for endorsement by WASBO and/or distribution or sale at a WASBO-sponsored event or paid for all or in part by WASBO are subject to concept review by the Executive Director, prior to distribution except for:

- A. Materials used and distributed by workshop presenters and represented as their own materials and/or views and not containing WASBO's name in the written, visual, or audio material.
- B. Miscellaneous reference material referred to and/or distributed in the classroom by instructors.

1.107 Legal Counsel

The Executive Director shall approve the use of outside legal services by WASBO in advance and update the board accordingly.

1.108 Liaisons

The WASBO President, or the Executive Director in consultation with the Board, will nominate and/or appoint, from among the membership, representatives to serve for WASBO on various state and national Boards, committees, commissions, and councils or to serve as liaisons. Such representatives may be members of the Board.

1.109 Election of Officers

The President, President-Elect, regional directors, and Secretary-Treasurer shall be elected at the Annual Conference. (Bylaw reference, [Article IX, Section 1](#))

A. Candidate Qualifications

1. Any candidate shall have been an active member of WASBO and have served as an active participant on a WASBO committee, task force, or special activity.
2. Candidates must meet all geographic qualifications for the position for which they are being considered. Committee members are to consider potential longevity in the geographic area as a factor in the nomination.
3. Candidates must have a demonstrated interest in WASBO and its activities and have shown leadership qualities in their employment and/or WASBO. Candidates must also have shown a time commitment to WASBO and its goals/programs. Candidates must be employed in a position that allows time flexibility and have the ability/authority to make decisions on WASBO issues that could affect their district and/or constituent districts.
4. The candidates for President-Elect shall be or have been a member of the Board.
5. Candidates must be of good moral character and have shown professional integrity throughout his/her career.
6. All candidates shall have a letter of written support from their immediate supervisor for the position for which they are nominated.
7. Candidates track area shall be considered as a factor in the nomination in the interest of broadening representation and diversifying the Board of Directors to best reflect the membership.

B. Elections

A nominating committee, chaired by the Immediate Past-President and consisting of the President, Immediate Past-President, and President-Elect, shall convene by December 1. WASBO shall advertise for candidates in the newsletter, website, e-mail and other media as may be available to members. The nominating committee will submit a list of possible candidates to the board at the March meeting.

By April, the slate of officers shall be published in the newsletter, website, e-mail and other media as may be available to members.

Candidates will be introduced to the membership at the general session of the Annual Conference and the slate of officers entered into nomination.

1. No candidate or candidate representative(s) may campaign for office or provide or distribute individual campaign literature or materials in any form (including electronic) at any time.
2. Voting will be by active members, registered and in attendance at the Annual Conference only. Voting for an uncontested slate of officers will occur at a general session prior to the final day and be conducted using a voice vote.

3. The announcement to the general membership will be made prior to the end of the conference, and elected officials will be sworn in at that time. (Bylaw reference, [Article IX, Section 2](#))

Election Schedule

DUE BY	TASK
December	The Nominating Committee (NC) convenes, submits, and reviews list of possible Board candidates at the December meeting.
First Board Meeting (of Calendar Year)	NC submits slate of officers for approval to Board, Executive Director personally contacts candidates
March	Slate of officers announced in WASBO publications
April (or 30 days prior to Annual Conference)	Acceptance deadline for additional candidates who wish to run for office post-publication
Conclusion of Annual Conference	Election of officers by membership

1.110 Affiliations

In addition to WASBO’s affiliation with ASBO, WASBO encourages involvement with regional associations within the state for exchange of information at the local level. It maintains no official affiliation with these associations. (Bylaw reference, [Article I, Section 3](#))

The Board, by a majority vote, may become affiliated with any organization it deems appropriate to reaching the stated objectives of WASBO.

1.111 Policy Development

In keeping with its authorized functions, the Board will adopt policies to carry out WASBO’s purposes and to ensure orderly operation. The Executive Director will be responsible for implementing the policies of the Board.

1.112 Policy Manual

The current policies and procedures, including bylaws will be available on the WASBO Governance web page.

Any requested revisions to the policies and procedures must be submitted to the current President and Executive Director. The proposed updates/changes will be presented to the Board of Directors for their review and action.

The Executive Director will be responsible for maintaining and updating the policies and procedures. The Immediate Past President shall prepare Bylaws and policy changes for presentation to the membership and Board of Directors. (Bylaw reference, [Article IV, Section 3c](#))

1.113 Representation of WASBO

The Executive Director will serve as official spokesperson for WASBO on a day-to-day basis, representing it before the Legislature and its committees, before various state agencies and commissions, and other public and private bodies.

If the Executive Director is not available or if it is determined that an expert representative is needed for a legislative or rule-making event, the Executive Director and/or President shall name the WASBO representative. In all cases, the party making the decision will notify the others with the name of the representative, the position WASBO is asking them to take and the basic points the person should make.

1.114 Board Expenses

Travel, lodging, and meal expenses will be reimbursed for Board members attending Board of Directors meetings or other activities that are authorized by the President and/or a majority vote of the Board of Directors.

A. Board members are expected to use discretion on board-related expenses.

Travel, lodging, meals, and other related expenses will be paid for the President or the President's designee to attend conferences, meetings, workshops, visitations, or other activities related to WASBO business. The necessity of attendance at such functions will be at the President's and Executive Director's discretion.

Travel, lodging, meals, and other conference expenses will be paid for the President, Incoming President, Outgoing President, and an identified President-Elect, and Executive Director to attend the ASBO International Conference and the ASBO International Leadership Forum. Lodging shall be at the conference headquarters when reasonable and possible. Conference fees, including all non-elective conference activities, will be paid by WASBO. If the President, Incoming President, Outgoing President or identified President-Elect is unable to attend, the Board may pay the expenses of another designee upon majority vote of the Board of Directors. Delegates will be expected to attend the entire conference as representatives of WASBO.

Miscellaneous expenses of a non-personal nature, including baggage fees, meals, etc., will be reimbursed if incurred while in travel status and are essential to or result from the travel arrangements and the business of WASBO. A receipt for each individual miscellaneous occurrence must be submitted with the reimbursement claim form.

Arrangements for and payment of lodging, meals, and transportation will be made directly by WASBO when possible.

All direct expenditures made by Board members will be reimbursed only upon receipt of a signed Travel Reimbursement form detailing expenditures and purpose of travel. Receipts for all expenditures, other than mileage, must be provided. Receipts for lodging must be itemized.

Travel Reimbursement forms must be received by the WASBO office within 5 business days of return from travel. If an expense receipt is lost, then an [Affidavit of Lost Receipt](#) must be submitted in lieu of the receipt.

Mileage will be reimbursed at the rate established by the I.R.S.

Board members are encouraged to always economize travel and to share travel when possible.

Chapter Two: Administration

2.0 Executive Director

2.01 Executive Director

The Board shall employ an Executive Director who shall serve as the chief executive officer and be responsible for the daily operations of WASBO. The Board shall determine the salary and fringe benefits, prescribe the duties, and the term of employment by written contract between the Board and the Executive Director. The specific duties of the Executive Director will be outlined in a job description for the position as approved by the Board. A committee consisting of the Outgoing-President, President, and Incoming President will evaluate the Executive Director annually. (Bylaw reference, [Article V, Section 6](#))

2.02 Administrative Reports

The Executive Director shall provide periodic reports on WASBO activities to the Board.

2.03 Conference/Convention Attendance

The Board authorizes the Executive Director to determine which WASBO employees need to attend various WASBO functions (e.g., Annual Conference, regional meetings, workshops) at WASBO' expense.

The Executive Director shall, when possible, represent WASBO at state association conferences (e.g., Washington State School Directors Association, Washington Association of School Administrators, and Washington School Nutrition Association) at WASBO expense.

2.1 Office Staff

2.101 Employment

All WASBO employees are at-will employees and serve at the pleasure of the Board. WASBO employees do not have contracts guaranteeing employment for a specific period of time and are considered to be at-will employees. The WASBO Board and Executive Director have the right to terminate employees at any time for non-discriminatory reasons. No WASBO representative may change the at-will relationship through oral or written promises. An existing employee can be terminated at any time at the discretion of the Executive Director. There will be no appeal process for termination.

The Board may authorize the Executive Director to employ, after recommendation from the Executive Director, one or more individuals as WASBO staff. The Executive Director will determine the terms of

salary and fringe benefits. The Executive Director shall determine staff responsibilities. The Executive Director will evaluate the staff each year. (Bylaw reference, [Article V, Section 6](#))

2.102 Personnel Records

It is the policy of WASBO to maintain personnel files for all employees, which shall be maintained at the WASBO Office.

A. Access to Records

The contents of the file shall be made available only to authorized personnel, including the Executive Director. These individuals shall be required to maintain the confidentiality of the files and the contents.

B. Employee Rights

1. An employee shall have the right to examine their personnel file in the presence of the Executive Director, the President, or the President's designee.
2. A copy of any complaint and/or derogatory material relating to an employee must be given to the employee within ten (10) days after the material is placed in the personnel file. The employee shall have the exclusive right to attach a signed and dated response to any such material. Any written response to complaints and/or derogatory material placed in an employee's personnel file must be presented within ten (10) days of the receipt of the material to which the response is being made.
3. Any material critical of a staff member and/or contractual employee which is not shown to them within ten (10) days after placement in their file shall not be allowed as evidence in any disciplinary action against such staff member and shall be removed from the personnel file.

C. Appeal to Remove Records

1. A staff member may appeal to the Board for the removal of any material placed in their personnel file or any disciplinary action, not including termination taken by their supervisor.
2. An appeal to remove documents from the employees personnel file must be made in writing to the President of the Board within ten (10) days of the action taken that is being appealed. The Board will consider the appeal to remove personnel documents at the next regularly scheduled Board meeting. The person appealing to have documents removed from their personnel file, may request the President, with the concurrence of three Board members, to call a special meeting pursuant to the Bylaws, Article VIII, Section 3, to hear the appeal when a regular meeting is not scheduled within 30 calendar days of receipt of the appeal to remove documents from their personnel file. All such appeals to remove documents from a personnel file will be heard in an executive session.

2.103 Credit Cards (Procurement Cards)

Credit cards are provided to the Executive Director, the Board President, Outgoing President, Incoming President and to WASBO employees at the Executive Director's discretion, to cover travel-related expenses and other purchases. The credit cards are for business use only and may not be used for personal purchases.

Employees utilizing the credit cards are responsible for safeguarding the credit card, as well as complying with purchasing policy, maintaining documentation, reconciling the bills monthly, and ensuring that the card is used only for authorized purchases. Upon termination of employment or vacancy of elected office with WASBO, employees and Board members must surrender all cards immediately.

Cardholders should get prior approval from the Executive Director before making purchases. Documentation is required to show the business purpose and the best pricing practices should be followed. Examples include itemized receipts and invoices. The receipt should itemize the purchases, lump sum receipts are not allowed.

Each month, the Administrative Services Coordinator will provide employees and board directors with their purchasing card statement. Employees will provide the Executive Director with a copy of the card statement and the receipts/documentation to support the purchases. documentation/receipts for each purchase listed.

The Executive Director will review each statement and backup documents by approving the reconciliation process and sign the statement verifying accuracy. The Administrative Services Coordinator will enter the purchases in QuickBooks and file the statements per records retention policy.

2.104 Office Staff Benefits

A. Benefits

A. Statutory Benefits

Deductions will automatically be made from an employee's salary in accordance with state and federal laws and regulations and/or lawful employee authorization.

B. Employer-Paid Benefits

The Board may establish benefit programs in accordance with state and federal law and available resources.

Full-time employees (a minimum of 2,080 hours per year) will receive a medical benefits package. Part-time employees (a minimum of 1,040 hours per year) will receive half of the medical benefits package.

A retirement plan for full-time employees, acceptable to the Executive Director, will be provided.

B. Sick Leave

1. Sick leave is defined as an absence from work for one (1) hour or more during normally scheduled work hours, workdays, or work weeks. It is applicable when an eligible employee needs time off due to personal illness, injury, temporary disability, or to provide emergency care for a relative under the employee's custody or residing in their home. This leave covers only the duration of the actual medical appointment and necessary travel time to and from the appointment. For all uses of sick leave, pre-approval from supervisor is required. Approval for medical appointments is required at least one week in advance of the scheduled appointment.
2. Paid sick leave shall be granted to the extent of accumulated credits but only when an employee is required to be absent from work for one or more of the above reasons. Sick leave may accumulate to a maximum of 70 normal working days. After three consecutive days' sick leave, a doctor's note may be required.
3. Sick leave accrues only when the eligible employee is on pay status. No sick leave accrues during absences without pay.
4. Eight (8) hours, or a portion thereof for part-time employees, shall be granted for each month in which an employee is in pay status for fifteen (15) or more calendar days as of the last day of the month.
5. No compensation for unused sick leave will be made to an employee or estate of employee upon death, retirement, or termination.
6. Employees may be eligible for Washington Paid Family and Medical Leave. If an employee intends to apply for Washington Paid Family and Medical Leave, they must notify the Executive Director of their intent and the anticipated amount of leave needed.
7. Employees shall file an application for Workers' Compensation benefits in accordance with state law due to injury or occupational disease resulting from such employment.
8. In the event of a workers' compensation claim, sick leave may be paid, if employee has accumulated sick leave available, to compensate the employee for any difference between actual workers' compensation received and the employee's salary that would have been paid during the absence.

C. Vacation Leave

Vacation leave shall be granted to each permanent employee who works a minimum of 1,040 hours per year. Employees working less than 2,080 hours will earn a pro-rated share based upon their FTE.

1. Employees begin to accumulate annual vacation leave from the date of employment but are not eligible to take more leave than what has been accrued.

2. Annual vacation time is cumulative to a maximum of two hundred and forty (240) hours (30 full normal working days) at fiscal year-end.
3. All requests for annual vacation leave must be approved in advance of the effective date unless used in lieu of sick leave or emergency leave, or unless the supervisor elects to the annual vacation leave on a retrospective basis.
4. Eligible employees shall not use or be credited with vacation leave credits until the end of the month in which the leave is earned.
5. Arrangements for payment of unliquidated vacation leave when an employee separates from service with WASBO, by reason of resignation, lay-off, dismissal, or retirement, shall be made prior to the date of termination with the Executive Director and the President. Payment will be made for no more than 240 hours.
6. No compensation for unused leave will be paid if an employee terminates or is terminated prior to the completion of six (6) months of continuous employment.

D. Other Leave

1. Bereavement Leave

- a. Eligible employees shall be allowed three (3) days of leave with pay for bereavement leave due to the death of an immediate family member. Up to two (2) additional days of leave may be allowed for travel or arrangements when needed.
- b. Three (3) days of leave shall be allowed in situations in which the attending physician deems that death is imminent for a member of the immediate family.
- c. The immediate family shall include the spouse, parents, legal guardian, domestic partner, grandparents, grandchildren, children and siblings of the employee or spouse.
- d. One (1) day of leave with full pay shall be allowed an employee for the death of other relatives or a close personal friend.
- e. All requests for bereavement or critical illness leave shall be made to the Executive Director.
- f. Such leave shall be in addition to any vacation or sick leave to which an employee might otherwise be entitled and shall not involve any loss of rating, privileges, or pay.

3. Parental Leave

- a. Eligibility
 - i. Employee has been employed at the organization for at least 12 months (the 12 months do not need to be consecutive).

- ii. Employees must be a full or part time employee of the organization.
- iii. Employee must have either given birth to a child, be a spouse or committed partner of someone who has given birth to a child, or have a adopted a child aged 17 or younger (the adoption of a child by a spouse is excluded from this policy)
- iv. Upon termination of employment at the organization, individuals will not be paid for any unused paid parental leave for which they were eligible.

b. Leave Duration

- i. WASBO provides 12 weeks of parental leave per year (the birth of multiple children or additional adoption does not increase the 12-week total leave granted for that event). In no case will an employee receive more than 12 weeks of parental leave in a rolling 12-month period.
- ii. Approved parental leave may be taken at any time during the 6-month period after birth or adoption.
- iii. Any WASBO recognized holidays will not extend the total parental leave entitlement period.

c. Compensation

- i. Washington state provides Paid Family Medical Leave for paternal leave and should be accessed through the state.
- ii. Annual Vacation Leave and Sick Leave will not accrue during parental leave.

d. Request for Parental Leave

- i. Employees shall provide written notice of the request for leave to the Executive Director at least 60 days prior to the proposed date of leave (if the leave was not foreseen, notice should be given as soon as possible).
- ii. Parental leave requests are to be approved by the Executive Director and are for no more than 12 consecutive weeks in duration.

E. Personal Leave

The Executive Director may grant not more than two (2) days of personal leave per calendar year to full- time regular employees who wish to transact personal business. Personal leave is a paid leave of absence and shall apply to an unforeseen circumstance or a series of circumstances that necessitate the employee's immediate action.

F. Jury Duty

The Board will allow leave with pay when the employee is summoned for jury duty and wishes to serve in that capacity. There is a two-week limit for time off related to jury duty service.

G. Holidays

All eligible employees shall receive compensation for the listed holidays. Part-time employees shall be paid only for those observed holidays that fall on days for which they would otherwise be scheduled to work and only for the number of work hours normally scheduled on that day(s).

Compensation for observed holidays shall only be made to those employees who are on a pay status not less than one (1) normal workday prior to and one (1) normal working day following the holiday period.

Paid holidays falling during a vacation or sick leave shall not be counted as days of vacation or sick leave.

Paid holidays for eligible employees:

- New Year's Day
- Martin Luther King's Birthday
- Presidents' Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day
- The day after Thanksgiving Day
- Christmas Day
- The week between Christmas and New Year's
- Personal Holiday - employees are entitled to one personal holiday per year. The immediate supervisor must approve the date selected in advance.

The Executive Director or their designee is responsible for monitoring and maintaining records of employee attendance, leave taken, and leave earned. The President is responsible for auditing the leave records of the Executive Director.

2.105 Whistleblower Policy

It is the responsibility of all Association employees to comply with the Code of Ethics. All employees are encouraged to report violations in accordance with this Whistleblower Policy.

A whistleblower as defined by this policy is an employee of the Washington Association of School Business Officials who reports an activity that he/she considers to be illegal or dishonest to one or more of the parties specified in this policy. The whistleblower is not responsible for investigating the activity or for determining fault or corrective measures; appropriate management officials are charged with these responsibilities.

Examples of illegal or dishonest activities are violations of federal, state or local laws; Billing for services not performed or for goods not delivered; and other fraudulent Financial reporting.

Encouragement of Reporting: If an employee has knowledge of or a concern of illegal or dishonest fraudulent activity, the employee is encouraged to report. The employee must exercise sound judgment to avoid baseless allegations. An employee who intentionally files a false report of wrongdoing will be subject to discipline up to and including termination.

Whistleblower Protection: Whistleblower protection is provided in two important areas -- confidentiality and against retaliation.

Confidentiality: Insofar as possible, the confidentiality of the whistleblower will be maintained. However, identity may have to be disclosed to conduct a thorough investigation, to comply with the law and to provide accused individuals their legal rights of defense.

Retaliation: The Association will not retaliate against a whistleblower. This includes, but is not limited to, protection from retaliation in the form of an adverse employment action such as termination, compensation decreases, or poor work assignments and threats of physical harm. Any whistleblower who believes he/she is being retaliated against must contact the Executive Director or Board President immediately. The right of a whistleblower for protection against retaliation does not include immunity for any personal wrongdoing that is alleged and investigated.

Where to Report: Complaints, reports, or inquiries may be made under this policy on a confidential or anonymous basis. They should describe in detail the specific facts demonstrating the bases for the complaints, reports, or inquiries. They should be directed to the Association's Executive Director or President. If both of those people are implicated in the complaint, report, or inquiry, it should be directed to a member of the executive board. The Association will conduct a prompt, discreet, and objective review, or investigation. Staff or volunteers must recognize that the Association may be unable to fully evaluate a vague or general complaint, report, or inquiry that is made anonymously.

Process of Action: All complaints, reports, or inquiries will begin with investigation initiated by the President or Executive Director. An initial investigation shall begin no later than five business days of the initial report. Outcome of the investigation will be reported to the President of the Board of Directors or the most senior officer of the Board of Directors if the investigation involves the President. The results of the investigation will be reported to the WASBO Board of Directors with appropriate resulting action recommended to the Board.

2.106 Prohibition of Sexual Harassment, Harassment, Bullying and Intimidation

Washington Association of School Business Officials expressly prohibits any form of unlawful sexual harassment, harassment, bullying and intimidation based upon race, color, gender, religion, national origin, age, disability, or any other protected characteristic.

Sexual Harassment as used in this policy, refers to all unwelcome sexual flirtations, advances or propositions, verbal abuse of a sexual nature, subtle pressure or requests for sexual activities, unnecessary touching on an individual, graphic verbal commentaries about an individual's body, sexually degrading words used to describe an individual, display in the workplace of sexually suggestive objects or pictures, sexually explicit or offensive jokes, and physical assault.

No supervisor, employee, officer, director, or member shall threaten or insinuate, explicitly or implicitly, that another employee's refusal to submit to sexual advances will adversely affect that person's employment, work status, evaluation, wages, advancement, assigned duties or any other condition of employment or career development. Similarly, no officer, director or member shall promise, imply or grant any preferential treatment in connection with another employee or applicant engaging in sexual conduct.

Harassment, Bullying, and Intimidation means any intentional written message or image, including those that are electronically transmitted, verbal or physical act, including but not limited to one shown to be motivated by race, color, religion, ancestry, national origin, gender, sexual orientation including gender expression or identity, mental or physical disability or other distinguishing characteristics, when an act:

- Physically harms the member or damages the member's property.
- Has the effect of substantially interfering with an employee or member.
- Is so severe, persistent, or pervasive that it creates an intimidating or threatening environment.
- Has the effect of substantially disrupting the orderly operation of WASBO.

Nothing in this section requires the affected member to possess a characteristic that is a basis for harassment, intimidation, or bullying.

"Other distinguishing characteristics" can include but are not limited to physical appearance, clothing or other apparel, socioeconomic status and weight.

"Intentional acts" refers to the individual's choice to engage in the act rather than the ultimate impact of the action(s).

Behaviors/Expressions

Sexual harassment, harassment, bullying or intimidation can take many forms including but not limited to, slurs, rumors, jokes, innuendos, demeaning comments, drawings, cartoons, pranks, gestures, physical attacks, threats, or other written, oral, physical actions or electronically transmitted messages or images.

This policy is not intended to prohibit expression of religious, philosophical, or political views, provided that the expression does not substantially disrupt the work environment.

Each member of management is responsible for creating an atmosphere free of sexual harassment, harassment, bullying, and intimidation. Further, employees are responsible for respecting the rights of their co-workers. It is the responsibility of each employee to report incidents of sexual harassment, harassment, bullying, and intimidation.

Any employee who feels he or she is a victim of sexual harassment, harassment, bullying or intimidation by any supervisor, management official, other employee, director, member or third party (such as a vendor or exhibitor) should bring the matter to the immediate attention of the Executive Director.

If for any reason the employee feels uncomfortable discussing the matter with the Executive Director, he/she should report the sexual harassment, harassment, bullying or intimidation to the President.

The Association will investigate all allegations of sexual harassment, harassment, bullying or intimidation. Any employee who is determined, after an investigation, to have engaged in sexual harassment, harassment, bullying or intimidation shall be subject to discipline, up to and including termination where warranted. Where the harassment is the result of the conduct of any member or other non-employee of the Association, the Association will take all reasonable measures to prevent further harassment.

Retaliation/False Allegations

Retaliation is prohibited and will result in appropriate discipline. It is a violation of this policy to threaten or harm someone for reporting sexual harassment, harassment, bullying or intimidation.

It is also a violation of policy to knowingly report false allegations of sexual harassment, harassment, bullying, or intimidation. Employees or members will not be disciplined for making a report in good faith. However, persons found to knowingly report or corroborate false allegations will be subject to appropriate discipline, up to and including termination where warranted.

The Executive Director and Executive Board will implement and maintain procedures addressing the elements of this policy.

2.2 Other Administrative Policies

2.201 Endorsements and Sponsorships

WASBO and the Executive Director, on behalf of WASBO, shall neither endorse nor oppose candidates for political elected office, either partisan or nonpartisan, at any level of government. WASBO and the Executive Director shall not take a position on political issues unless they affect the operation or support of public schools.

Under no circumstances will WASBO and the Executive Director endorse or participate in any external program or activity which conflicts with any WASBO policy.

Endorsing a product or service is construed as making a recommendation to the members of WASBO regarding use of that product or service. WASBO and the Executive Director will not endorse products or services of a private company. The Executive Director shall inform the Board of all written requests for WASBO endorsements.

Sponsorships of various WASBO programs, events, and segments of such programs and/or events are welcome. Sponsorships may be provided in the form of a cash donation or service in kind. Any firm doing business with the State's K-12 school districts or any firm or individual who has products or services of potential benefit to those districts may offer sponsorships. WASBO officers and directors, staff, networking group chairs, or other members directly involved in

specific WASBO activities may also solicit sponsorships where such sponsorships would be helpful to WASBO.

In exchange for such sponsorship, public acknowledgement will be made in one or more of the following ways: on appropriate signage, in electronic programs, and in announcements by those conducting the meetings. Public appreciation for these sponsorships will be just that, an expression of thanks for that support.

2.202 Sponsorship and Business Partner Policy

As a benefit to its members, WASBO may enter into agreements with outside partners, including other associations, companies, foundations and individuals, who can assist with program and service delivery to the membership. WASBO encourages relationships with both business associate members and outside sources that benefit the mutual interest of both parties.

The WASBO [mission and strategic plan](#) will guide the relationships established with third parties that may result in implied endorsements or recommendations of products or services to members.

The following will be taken into consideration when considering an agreement:

- [Mission and strategic plan](#) of WASBO
- Preserving or promoting trust in WASBO
- WASBO employee and board member objectivity
- Benefit to WASBO members and WASBO.
- Implementation of a process of comparison and open records
- Agreement must not injure members of WASBO.
- The board or appointed committee will determine if an exclusive endorsement will be allowed.
- The Association will not be an agent for the sponsor or business partner; it will remain independent and have no liability for the sponsor or business partners' activities.
- A sponsor or business partner of a single product or service should not imply the Association's endorsement of everything the sponsor or business partner offers.

Business partners desiring a sponsorship or business partner agreement shall submit a written request to the Executive Director. Agreements related to sponsorship of events or materials shall be approved by the Executive Director. Agreements resulting in a business partner designation shall be presented to the board or designated committee for approval.

Approved business partner agreements shall be in writing and reviewed annually by the Executive Director. Business partner agreements will contain performance goals to measure the benefits of the agreement. An annual report on performance goals will be completed. WASBO has the right to review any promotional materials referencing this relationship as prepared by the company prior to publication/distribution.

All agreements shall include a clause noting that termination without cause may occur with 30 days written notice.

WASBO membership shall be given an annual notice that the district is responsible for ensuring compliance with procurement and all other federal, state and local laws and regulations. WASBO is not responsible for any disputes or compliance issues a district may encounter with a business partner or sponsor. Any membership complaints about a business partner or sponsor will be directed to the Executive Director.

2.203 Office Facilities

The Board will provide facilities for the WASBO offices.

2.204 Use of WASBO Mailing List

A WASBO membership directory is available to active and associate members via the WASBO website.

Under no circumstances will WASBO's membership mailing list be released to any individual or organization for political purposes.

2.205 Records Retention

- A. WASBO shall maintain all records and files in a systematic and orderly fashion.
- B. Commonly accepted office protocol will be the guiding norm, along with the accompanying Records Retention Schedule, which is part of this Policy.
- C. Any records not now covered by this policy shall be dealt with by the Staff and Board on an as-needed basis. See Records Retention Schedule.

RECORDS RETENTION SCHEDULE

CATEGORY	TYPE OF RECORD	RETENTION PERIOD
By-Laws	<i>-By-Laws & Constitution</i>	Permanent
Corporate	<i>-Articles of Incorporation</i> <i>-IRS Exempt Letter</i>	Permanent Permanent
Governance	<i>-Board Agendas & Minutes</i> <i>-Policies & Procedures</i>	Permanent Permanent
Financial	<i>-Investment Accounts</i> <i>-Audits, Tax Returns</i> <i>-Bank Statements -</i> <i>Cancelled Checks</i> <i>-Financial Reports</i> <i>-Accounts Payable/Receivable</i> <i>-Payroll Records</i>	7 years 7 years 7 years 7 years 7 years 7 years 7 years after termination
Personnel	<i>-Employment Applications</i> <i>-Employee Files / Evaluations</i> <i>-Payroll Records</i>	3 years 7 years after termination Under Financial
Insurance	<i>-Policies</i> <i>-Reports</i> <i>-Claims</i>	Termination plus 6 years 4 years Settlement plus 6 years
Membership	<i>-Computer Database</i>	When obsolete or superseded
Committees	<i>-Meeting Minutes, Agendas</i>	6 years
Publications	<i>-Newsletter</i> <i>-Archives</i>	1 copy each issue to be permanent

Correspondence	<i>-Routine -Legal</i>	2 years 2 years unless part of a case file; then close of case plus 10 years
Office Property	<i>-Depreciation</i>	Permanent
ASBO & Affiliates	<i>-Newsletters, Magazines -Correspondence</i>	No retention value
Miscellaneous	<i>-Photographs -Inventories</i>	Permanent 7 years
Clock Hours	<i>Registration Forms</i>	7 years
Workshops & Curriculum	<i>Registration Forms</i>	Permanent

2.206 Soliciting Opinions or Information from Agencies

- A. No member or instructor may release policy statements or represent WASBO's position on issues without the approval of the President, the Board, or the Executive Director. This is not to preclude ordinary communications between members/committees.

- B. The President and the Executive Director shall be the sole spokespersons for WASBO. Board members, staff, instructors, or members may not issue communiqués, (written verbal, audio, and visual) without the express direction of the President, Executive Director, or the Board.

2.207 Internal Controls

- A. Internal Control Guidelines

1. Introduction

An internal control system consists of the plan of organization and methods and procedures adopted by WASBO to ensure that resource use is consistent with law, regulation, and policy. The plan guards against waste, loss, and misuse of resources. It ensures reliable data is obtained, maintained, and fairly disclosed in reports.

The ultimate responsibility for good internal controls rests with the WASBO Executive Director. Internal controls are, therefore, an integral part of WASBO processes and procedures. WASBO administration periodically reviews its internal controls to ensure proper conduct of WASBO business. This review provides assurance that:

- a. Systems are adequate to:
 1. Manage and account for resources,
 2. Meet the goals and objectives of WASBO, and
 3. Ensure compliance with state and federal regulations.
- b. There is an audit trail from reports to source documents.
- c. Staff members properly use systems and comply with WASBO policies and procedures.

- d. To the extent practicable, duties are segregated among employees to allow for the maximum security of assets.

2. Procedure

The following internal control standard defines the minimum level of quality. These standards should apply to all operations and administrative functions but are not intended to limit the development of discretionary policymaking in WASBO.

B. Reasonable Assurance

Internal control systems are to provide reasonable assurance that the objectives of the system will be accomplished. Reasonable assurance recognizes that the cost of internal control should not exceed the benefit derived.

C. Appropriate Organization Structure & Competent Personnel

The organization of WASBO should provide its administration with the overall framework for planning, directing, and controlling its operations. Good internal control requires clear lines of authority and responsibility, appropriate reporting relationships, and appropriate separation of authority. Employees should maintain a level of competence that allows them to accomplish their assigned duties.

D. Control Objectives

Internal control objectives should be identified and developed for each WASBO activity and are to be logical, applicable, and reasonably complete. Control objectives should be tailored to WASBO's operations, and all operations can generally be grouped into one or more categories, or "cycles." A cycle represents the identifying, classifying, recording, and reporting information required for processing a particular transaction.

E. Control Techniques

Internal control techniques are to be effective and efficient in accomplishing their internal control objectives. Techniques include, but are not limited to, specific policies, procedures, plans of organization, separation of duties, and physical arrangements.

1. Documentation

Internal control systems and all transactions and other significant events are to be clearly documented. Documentation includes written policies and procedures, organization charts, manuals, flowcharts, and related written materials used to describe internal control methods and measures that communicate responsibilities and authority.

2. Recording of Transactions & Events

Transactions and other significant events are to be promptly recorded and properly classified. This ensures that information maintains its relevance and value to the administration in controlling operations and making decisions.

3. Separation of Duties

Key duties and responsibilities in authorizing, processing, recording, and reviewing transactions should be separated among individuals. To reduce the risk of error, waste, or wrongful acts, it is desirable that no one individual controls all key aspects of a transaction or event. If staffing constraints are such that separation among individuals is not possible, to the extent desirable, additional reviews by supervisors will be necessary to provide the oversight required.

4. Supervision

Qualified and continuous supervision of employees and processes is to be provided to ensure that internal control objectives are achieved. Supervisors should continuously review and approve the assigned work of their staff and provide their staff with necessary guidance and training to help ensure that errors, waste, and wrongful acts are minimized and compliance with WASBO policies and procedures is achieved.

F. Misuses or Theft of WASBO Funds or Assets

1. Misuse of WASBO Funds

When a suspicion exists concerning the possibility of missing or mishandling of WASBO funds, the Executive Director and/or Board President must be notified immediately. The Executive Director or Board President will review the situation and coordinate necessary action.

2. Theft of WASBO Assets

In the event it is determined that missing assets are the result of theft, the WASBO Board must be notified immediately, and take appropriate action up to and including termination.

G. Use of WASBO Equipment

WASBO employees may use equipment such as telephones and computers for personal use only at normal break times. Long distance calls or personal copies, charged to WASBO, are prohibited. No WASBO equipment may be used to view or discuss pornographic materials.

2.208 Fixed Assets

Property records and inventory records shall be maintained on all land, buildings and equipment under the control of WASBO in a Fixed Asset System.

For purpose of this policy, "fixed assets" shall mean a unit of furniture or furnishings, and instrument, a machine, an apparatus or a set of articles which retains its shape and appearance with use, is nonexpendable, and does not lose its identity when incorporated into a more complex unit, is valued above \$5,000. No equipment shall be removed for personal or non-WASBO use.

WASBO will maintain a comprehensive fixed assets program requiring periodic inventory of entity assets, designed to protect the organization against losses which would significantly affect the organization's members, personnel, property, budget or the ability of the organization to continue to fulfill its responsibilities. This program will take into consideration the

requirements of the laws and regulations of the state of Washington. The Board will be provided with a report immediately identifying equipment not accounted for. The Executive Director will develop procedures to implement this policy.

2.209 Conflict of Interest

Each Employee, Board Director or Officer of the Washington Association of School Business Officials will avoid all instances where the individual's personal or financial interests would conflict or may appear to conflict with the Objects and Purposes of the Association set forth in its Bylaws. (Bylaw reference, [Article II](#))

Employees, Board Directors and Officers of the Association are required to safeguard the Association's confidential information and not use any information about the Association for personal gain or benefit.

While it is not practical to enumerate all situations that might conflict or appear to conflict with the Association's Conflict of Interest Board Policy, the examples given below highlight some of the relationships which must be avoided. It is a conflict with the Association's interests and a violation of its trust for an Employee, Board Director or Officer to:

1. Knowingly engage in any activity or take any position which conflicts with, or has the potential of conflicting with, the Objects and Purposes of the Association.
2. Use confidential information gained during the Employee's, Board Director's or Officer's relationship with the Association for his or her own benefit or for the benefit of others with whom the Employee or Board Director or Officer is associated.
3. Benefit financially because of his or her role with the Association to the detriment of the Association.

In furtherance of this Policy, the Association requires that each Employee, Board Director, acting in that capacity or in the capacity of an officer:

1. Disclose to the Association any facts or circumstances which may constitute actual or potential conflicts between the personal or financial interests of the Employee, Board Director or Officer that might operate to the detriment of the interests of the Association.
2. Refrain from acting or debating on any Board action or other decision of the Association as noted in the official minutes in which the personal or financial interests of the Employee or Board Director or Officer conflict with the Objects and Purposes of the Association.

Chapter Three: Fiscal Management

3.0 Accounting

3.01 Accounting and Reporting

The Executive Director will report at each regular meeting of the Board on the financial affairs of WASBO. Each month the Executive Director will prepare a monthly bank reconciliation and financial statement for review and approval by the WASBO Secretary-Treasurer. The Secretary-Treasurer will complete the monthly checklist that confirms review of the financial records. A copy of the monthly financial report and Secretary-Treasurer checklist will be provided to the Board with the meeting packet. (Bylaw reference, [Article I, Section 5](#))

3.02 Audit & Review

The Executive Board shall select the accounting firm that will be responsible for the preparation of the triennial audit based on recommendations made by the Executive Director. The accounting firm will present the audit report to the Board at the next Board meeting following the completion. In the years when an audit is not required the accounting firm will complete an annual review of financial records. (Bylaw reference, [Article I, Section 5](#))

3.03 Authorized Signatures

The Board authorizes the signature of WASBO Secretary-Treasurer and/or the Executive Director on such documents as payroll approval, paychecks, and checks to vendors for payment. The Board authorizes the signature of the Executive Director on WASBO documents that do not require Board approval prior to signature. Signatures on any other documents other than those designed herein are not authorized to bind and/or obligate WASBO unless expressly approved by the Board.

3.04 Budget

The budget for the ensuing fiscal year shall be approved no later than the board meeting tied to the annual Board Retreat and before June 30. The Executive Director will create the proposed budget for review by the Board at the March meeting. The power to approve alterations in the budget shall rest with the Board.

3.05 Depository of Funds

The Board will name a bank to serve as depository of WASBO funds.

3.06 Fund Balance Maintenance

The Association will maintain a targeted fund balance of \$250,000.

3.1 Revenue

3.101 Dues

Dues apply to the fiscal year which is July 1 through June 30.

3.102 Payment of Dues

Membership dues are due by the date of the Annual Conference. (Bylaw reference, [Article X](#))

3.103 Revenue from Non-Dues Sources

The Board and/or Executive Director will explore revenue sources other than membership dues. Other revenue sources include curriculum classes, workshops, on-demand learning and sponsorships.

3.104 Annual Conference Workshops and Courses

All related costs will be estimated when establishing the registration fees for the Annual Conference, professional development workshops and courses.

3.105 Investments

Purpose

This policy establishes standards and guidelines for the direction, management, and oversight of WASBO's investable cash and funds. Funds must be invested prudently to assure preservation of principal, provide liquidity for meeting cash requirements and provide a market rate of return.

This policy:

- Describes appropriate risk parameters for the investment of WASBO's assets.
- Specifies the target asset allocation.
- Establishes investment guidelines and performance goals regarding the selection of permissible securities and diversification of assets.
- Specifies the criteria for evaluating the performance of WASBO's assets.

These policies are intended to be broad enough to allow the Executive Director to function properly within the parameters of responsibility and authority, yet specific enough to adequately safeguard WASBO investments.

Investment Objective and Overview

The primary objectives of WASBO investment activities are defined by the projected business cycle requirement for the funds invested.

Operating Funds: Are those cash funds generated by and utilized for the routine operational needs of the fiscal year. The Board's Goal is to maintain a minimum operating cash balance adequate to meet the cash flow needs of each quarter. Operating funds in excess of those needs may be transferred into a short-term investment.

The investment objective for these funds is 100% liquidity, preservation of capital, with a rate of return greater than the 90-day Treasury bill.

Investment Funds: Are considered to be long-term funds available to maintain financial stability of the organization during periods of an economic downturn or unexpected events. These typically are expected to remain invested for six months or more. The investment fund may also include temporary investment of operating funds not necessary for the next 60 days to meet cash flow needs.

The investment objectives of the Investment Funds are preservation of principal, a rate of return greater than the 12-month Treasury bill, and reasonable liquidity.

The total portfolio should be balanced, with exposure to equities, fixed income, and cash. The risk tolerance for the Investment Fund will be moderate (compared to other asset mixes), striving to keep the volatility moderate with regards to quarterly returns.

Available Investment Funds

Each year the board shall formally establish the annual level to be designated as Investment Funds for the upcoming year.

Operating Funds: The Executive Director and the Secretary Treasurer shall prepare quarterly cash flow projections of the upcoming cash flow needs of WASBO. Operating funds in excess of the 90 days projected needs may be transferred into the investment account by the Executive Director.

Investment Strategy/Asset Allocation

Operating Funds: In line with WASBO's investment objectives and risk parameters. The mix of assets should be maintained as follows.

Asset Class	Target Allocation
Cash and equivalents	100%

Investment Funds: In line with WASBO's investment objectives and risk parameters. The target for mix of assets should be as follows.

Asset Class	Target Allocation
Cash and equivalents	10%
Fixed income	45%
Equities	45%

Rebalancing shall be performed at least once annually or more frequently if deemed necessary.

WASBO will strive to utilize a multi-manager approach for better diversification and exposure to various styles of money management (i.e., value/growth, large cap/small cap).

Investment Policies and Constraints

Prohibited Investments: WASBO funds may not be directly invested in:

- Direct investment in individual securities in the tobacco, alcohol, marijuana, or gun industry
- Short sales
- Purchase of securities not readily marketable
- Commodities transactions
- Puts, calls, straddles, or other option strategies (except covered call writing)
- Direct investment in real estate
- Purchase of inverse or range floater bonds
- Purchase of interest only/principle only bonds (except U.S. Treasury securities)
- Any type of derivative security not explicitly allowed in this policy statement.

Any other securities transaction not specifically authorized in this policy, unless approved in writing by the WASBO Board, is also prohibited.

Contribution into the Investment Fund in excess of fifty-thousand dollars (\$50,000) shall be dollar cost average no less than three (3) months.

Delegation of Authority

The ultimate responsibility and authority for the investment of WASBO Funds resides with the WASBO Board. The Board will establish an Investment Committee, which will provide investment performance updates twice a year (September/October and March). The transactional management responsibility for the investment program is hereby delegated to the Executive Director.

Transfers of operating funds into and out of the investments to meet the projected cash needs may be executed by the Executive Director, who will provide timely communication of such transfers to the Board. For the purposes of this policy, timely notification is deemed to be within 5 business days and may be made to the Investment Committee.

Transfers out of the designated Investment Funds may not be made by the Executive Director without documented Board approval. Board approval may be evidenced by a written approval from the Investment Committee.

Approval of WASBO Board of Directors

Deviations from the investment policies and constraints outlined in this document must be formally authorized by the WASBO Board of Directors.

The investment policy, as set forth in this document, may be reviewed/revised as needed but shall be reviewed no less than every two years.

3.106 Advertising

The Board shall establish advertising rates for WASBO publications and the website.

3.107 Data Security

WASBO will develop, safeguard, and maintain control over access rights and user privileges and will develop and follow formal procedures to facilitate the implementation of the Payment Card Industry Data Security Standard (PCI).

Such procedures shall include provision to:

- A. Maintain control over access rights and user privileges for confidential information.
- B. Inventory and physically secure all media that stores confidential information.
- C. Provide procedures for the destruction and disposal of hard copy materials.
- D. Establish appropriate internal controls to safeguard confidential data.
- E. Establish procedures for timely security breach incident response.
- F. Enforce strong **password policies, firewalls, and regular security audits** to protect against cyber threats.

3.108 Use of Artificial Intelligence

Artificial Intelligence (AI) has the potential to streamline or automate daily tasks, assist with content creation, and facilitate member engagement. As rapidly developing technology, AI may pose challenges, and this policy is designed to guide employees in responsible and appropriate use of AI in their work.

Generative AI (GAI) is AI that can create new content in response to prompts, including text, speech, and images (e.g., ChatGPT). GAI learns from data and information input by users.

Approved AI Tools

Subject to other terms of this policy, employees may use approved AI tools to perform or assist in performing work-related activities.

If an AI tool is built into a website or application generally used by the employee for work-related purposes, the employee need not seek approval to use that AI tool as long as any use complies with the other provisions of this policy. If an employee is uncertain about whether use is permitted, the employee should confer with their supervisor.

Any tool requiring a license, software, or application must be approved by the Executive Director.

Responsible Uses of AI

AI tools may be used for routine tasks such as drafting or revising communications, creating event descriptions, and idea generation. Publicly available tools that use input data to train the tool may not be used for tasks that require uploading or entering Association proprietary content. (See **Security and Data Protection** below.)

AI tools that transcribe or summarize meetings may not be used when personally identifiable information (PII) will be discussed if the AI tool will use the meeting information to train the AI tool for use by the public. In addition, such AI tools may only be used during meetings if first disclosed to meeting participants.

Questions about acceptable use should be directed to the Executive Director **prior** to the use in question. (See other restrictions on **AI and Intellectual Property** below.)

Responsibility for Content

AI may produce inaccurate or false information. Consequently, employees retain responsibility for the accuracy and quality of content generated by or with the assistance of AI in all instances. AI is not a replacement for human creativity, expertise, or judgment. AI-generated output should be considered a starting point and not an end product. Employees must carefully review content before publication or dissemination. If errors or negative outcomes result from AI-generated content, the employee must take steps immediately to remediate and report the occurrence to the employee's supervisor.

Security and Data Protection

Employee use of AI is subject to all provisions of this procedure related to the use of technology. Employees may not submit member or staff data or other sensitive or proprietary Association information into AI tools unless the submitted data or information is otherwise generally available to the public.

Training

Employees will complete any required training on the use of AI in their positions with the Association.

AI and Intellectual Property

AI-generated works may not be copyrightable. In addition, the output from an AI tool may include intellectual property of others. To avoid violating the rights of third parties, AI-created content may not be included in

proprietary works, such as course manuals or other publications, unless the content is based solely on Association-owned information and resources and the AI tool used is approved for the use.

3.2 Expenses

3.201 Expense Reimbursements

Expenses incurred by the WASBO Board members, Executive Director, and staff as a result of acting on behalf of WASBO will be reimbursed upon approval of the Executive Director when a properly executed claim with receipts for reimbursement is filed with WASBO. The WASBO Secretary-Treasurer will approve the Executive Director's expenses. Meals, hotel, and transportation expenses will be refunded at actual cost. Travel in personal automobile will be refunded at a mileage rate set by the IRS. Questions on any expense reimbursement will first be directed to the Executive Director, then to the WASBO President.

3.202 WASBO Credit Cards (Procurement Cards)

The Executive Director is authorized by the Board to use credit cards for WASBO use. Receipts for all credit card transactions will be provided to WASBO for audit purposes.

3.203 WASBO Annual Conference

It is the obligation of WASBO members and representatives attending the Annual Conference to pay registration fees and their own expenses. WASBO will pay for the housing and registration fees at the Annual Conference for the Board. WASBO pays the appropriate expenses of the WASBO Executive Director and staff for the Annual Conference. The current Networking Chairs are each given one complimentary conference registration for their volunteer service.

3.204 WASBO Workshops and Programs

Board members are entitled to complimentary enrollment in any event produced by WASBO or a WASBO networking group. Networking group chairs and co-chairs are entitled to complimentary enrollment in one workshop produced by any networking group and enrollment in one workshop produced by any networking group at a 50% discount. This does not apply to accounting curriculum classes, the annual Business Managers Conference (BMC) or the conference Pre-Con sessions.

3.205 ASBO International Dues

WASBO will pay ASBO International dues each year for the Executive Director, WASBO staff and Board Directors who submit a request for ASBO membership.

3.206 ASBO International Annual Conference

WASBO will pay the appropriate business expenses for attendance at the Association of School Business Officials International Annual Conference of the Executive Director, President, Incoming President and Outgoing President. The expenses include registration fees, hotel, transportation, and other appropriate business expenses incurred because of their travel for board related participation.

3.207 ASBO International Leadership Forum

WASBO will pay the expenses for the following individuals to represent WASBO at the ASBO International Leadership Forum: Incoming President, President, Outgoing President, future identified President-Elect or Board Member designee, and Executive Director.

3.208 Other Association Related Meetings

WASBO will pay the travel expenses of the Executive Director to attend other association-related workshops and/or conferences that have been reviewed by the Board.

3.209 Purchasing of Goods and Services

The Executive Director is authorized to purchase goods and services in accordance with the budget. The Board shall approve leasing arrangements.

Chapter Four: Programs and Services

4.0 Programs and Services

The Executive Director will have responsibility for investigation and development of services needed by the membership that may be provided by WASBO.

Before implementation of such services and changes, the Board will review new services and significant changes in services.

4.1 Programs

4.101 Annual Conference

An Annual Conference for the discussion of timely educational topics shall be held at a time fixed by the Board. Board members will receive 30 clock hours per year for their board service. These hours will be awarded following the annual conference in May.

Annually, WASBO will survey the membership for interest in serving on the Conference Planning Committee. Selection of members should be made no later than September of each year. The Incoming President will chair the Conference Planning Committee. The Conference Planning Committee will recommend a theme, keynote speaker and service project. WASBO will determine the conference format session schedule and approve any recommendations from the Planning Committee. The Annual Conference will provide an exhibit hall for vendors.

Invited guests to the Annual Conference may include: an ASBO International representative, Executive Directors from affiliated state associations, and Executive Directors from any ASBO affiliate who expresses interest in attending. Special guests should be limited to ten registrations.

4.102 Professional Development Workshops and Courses

WASBO will sponsor professional development workshops and courses on special topics and issues. Board members receive complimentary registration to any professional development workshop. Networking group chairs receive complimentary registrations to one workshop annually and 50% discounted registration fee for other networking group workshops and one complimentary registration for each networking group chair (the chair may give their complementary registration to the group's co-chair) to the Annual Conference.

Networking groups, in conjunction with the Executive Director, will provide the topics and presenters for all workshops and courses.

4.103 No-Shows at WASBO Functions

Workshops and Courses: A service fee set by the Board is charged for refund requests made in writing as follows:

Cancellation Policy

Cancellations received 30 or more days prior to the event will receive a 50% refund.

Cancellations received after 30 days, no refunds.

If you are registered for a workshop or training and you do not attend without canceling in advance (No-Show), your district may be notified.

Name substitutions and location changes (if applicable, i.e. ASB workshops) will be accepted up to 10 days prior to the event.

This policy will be placed on the website and event emails. The board fee review group will review the cancellation policy each year.

4.104 Professional Certification Program

The Board of Directors shall appoint members of the Certification Governance Board consistent with [Article VI](#) of Association Bylaws.

The Professional Certification Board may award certifications to qualified applicants for the certified School Business Administrator (CSBA), School Business Official (CSBO), and School Business Specialist (CSBS).

Eligibility requirements to be considered for certification as a School Business Administrator, School Business Official, or School Business Specialist shall include active WASBO membership status.

4.2 Services

4.201 Legislative Committee

The Legislative Committee is selected annually by member interest survey. The Legislative Networking Chair, Co-Chair and Government Relations liaison lead the group. The purpose of the WASBO Legislative Committee is to provide the Legislature with information that will enable it to enact sound education legislation for public schools. The Executive Director will appoint and work with the Legislative Committee to develop annual Legislative Priorities recommended by the Legislative Committee and adopted by the Board.

4.202 Continuing Professional Education Credits

WASBO will be a professional education credit sponsor so that members who are earning professional credit as accountants, educators, and business officials can receive continuing professional education credits for attending association-sponsored workshops, classes, and the Annual Conference.

4.203 Clock Hours

WASBO will sponsor clock hours for members attending WASBO-sponsored workshops, classes, the Annual Conference, and other qualified WASBO events. The board will establish the credit hours associated with paid professional learning.

4.204 Publications

WASBO members will receive an e-newsletter, regular email communications, and other publications.

Members will be notified of all WASBO workshops, certification classes, and the Annual Conference.

4.205 WASBO Website

WASBO will create and maintain a website to provide information for members and others interested in school business management issues. The WASBO Bylaws, Policies, and Board meeting agendas shall be posted to the [website](#). The Executive Director or designee will be responsible for the operation of the website and the information contained therein.

4.206 WASBO Email System

The Executive Director will provide timely information to the membership via an electronic mail system. The Executive Director or designee will maintain the list of email addresses.

4.207 Public Information Program

The Executive Director is authorized to prepare press releases on behalf of WASBO and to grant interviews.

4.208 Evaluation of Programs and Services

Evaluations will be solicited to obtain membership reaction to programs and services. Results will be reported to the Board and utilized for future program and service planning.

4.209 Scholarship Programs

A. Event Scholarships

WASBO will make scholarships available to members for registration fees for WASBO's courses, workshops, Business Managers Conference and the Annual Conference. Scholarships for lodging and meals are not available unless included in the registration fee. Scholarships will be awarded based on scores from the event scholarship rubric. The total amount awarded for the fiscal year shall not exceed the amount budgeted. The Board shall set the number of awarded scholarships per event type based on using 75% of prior year scholarship revenues or a specific amount with borders around bank balance. These numbers may fluctuate if there are scholarships left over from one event type and needed for another. The Board may authorize other scholarships donated by affiliate members and outside organizations. The proceeds from the Annual Conference Raffle and Silent Auction or its replacement, shall be used to provide scholarships for members to attend WASBO sponsored functions.

Current Board members are ineligible to apply for and receive scholarships.

The Board will appoint an annual selection committee comprised of up to five (5) board directors to review and score scholarship applicants. The scholarship selection process is as follows:

Application Due Dates:

Event Type	Due Date
WASBO Annual Conference	Early October Year Prior
WASBO Business Managers Conference	Late February Year Of
WASBO Workshops	5 Weeks Before Event
WASBO School Accounting Classes	5 Weeks Before Event
WASBO On-Demand Learning Course	No Deadline

1. WASBO staff pre-screens the applicant for: current membership, past scholarships and WASBO participation.
2. The board scholarship committee reviews the application and scores the applicant via a rubric.
3. The final recipients are provided in the board packet for the next board meeting and are documented in the meeting minutes.

B. Membership Scholarships

WASBO will make scholarships available to non-members to cover the annual dues fee for a WASBO membership. Scholarships will be awarded based on priority of whether the individual is a first-time member, pursuing a WASBO certification, and their financial need, both district and personal. The total amount awarded for the fiscal year shall not exceed the amount budgeted.

Current Board members are ineligible to apply for and receive scholarships.

The WASBO staff will collect, review and award membership scholarships.

4.210 Procurement Card Program

WASBO may offer a procurement card program to school and educational service districts. WASBO will not charge fees to join the program. The board may withhold an amount for administration and overhead, equivalent to the amount between the current and previous tier in the rebate schedule and will assess that amount to member districts based on their payment schedule. WASBO will distribute rebates to member districts within 30 days of receipt.

Appendix I

Policy Manual Adoptions and Amendments

Date Adopted	Policy Number	Effect
February 12, 2016	Various	Typographical Errors Corrected – Record of tracked changes available.
June 24, 2016	3.105 Investments	Complete Rewrite of Investment Policy
February 24, 2017	2.106 Harassment	Policy rewritten and retitled to Prohibition of Sexual Harassment, Harassment, Bullying and Intimidation
June 29, 2018	4.209 Scholarships	Updates to Scholarship Programs
June 29, 2018	4.104 Cancellation	Update of Cancellation and No-Show Policy
March 18, 2021	Various	Updated many policies, referenced bylaws, updated table of contents, added appendix 2
May 11, 2021	3.105 Investments	Updates to investment policy from Board working group
May 11, 2021	Appendix 2 Fee Schedule	Updated non-member pricing per Board vote to increase non-member pricing
June 15, 2022	Appendix 2 Fee Schedule	Updated 2022-2023 pricing per Board vote.
May 2, 2023	Appendix 2 Fee Schedule	Updated 2023-2024 fee schedule per Board vote
September 29, 2023	1.105 Networking Groups, Committees and Boards	Updated section 1.105
May 7, 2024	Various	Revised multiple policy sections for improved clarity.
March 20, 2025	1.12 Fostering a Culture of Belonging	New section
March 20, 2025	3.105 Investments	Reporting dates and authority updates
March 20, 2025	3.107 Data Security	Add Cybersecurity updates
March 20, 2025	3.108 Artificial Intelligence	New Section
March 20, 2025	Appendix 2	2025-2026 Fee Updates
September 25, 2025	Appendix 2	2026 Conference Fee Updates
March 19, 2026	Appendix 2	2026-2027 Fee Updates

Appendix 2

WASBO 2026–2027 Fee Schedule

Effective July 1, 2026 – June 30, 2027

Annual Membership Fee

(Per Person, Pro-Rate Not Available)

Description	Fee Amount
Individual Membership	\$250
Vendor/Affiliate Membership	\$300
College Student	\$75
Retired/Honorary	\$0

Optional Annual Learning Access Add-On

Description	Fee Amount
Annual Learning Access Option	\$300

Total Annual Cost (Membership + Learning Access): \$550

Annual Learning Access participants receive year-round access to:

- On-Demand Badge Programs
- Technical Training Sessions
- Core Professional Development Webinars
- Webinar Recordings
- Virtual PD sessions designed to replace traditional workshops
- Agency & Regulatory Updates
- Role-based ASB virtual learning opportunities

Programs **not included** in Annual Learning Access:

- ASB In-Person Trainings
- Introduction to School Accounting
- School Accounting Series (SA1–SA3)
- Annual Conference Registration
- Business Manager Conference Registration

Professional Certification Fees

(Per Designation)

Certification	Fee
New Certified School Business Administrator (CSBA)	\$100
New Certified School Business Official (CSBO)	\$100
New Certified School Business Specialist (CSBS)	\$50
Renewal CSBA	\$75
Renewal CSBO	\$50
Renewal CSBS	\$25
Renewal Late Fee (Within 90+ Days of Certification Expiration)	\$50

Learning & Professional Development Pricing

Program	Annual Learning Access Participant	Member Only (No Add-On)	Non-Member
On-Demand Badges (per credit)	Included	\$35	\$50
Technical Trainings (per credit)	Included	\$35	\$65
Core Webinars -Agency & Regulatory Updates – Per Credit	Included	Included	\$75
Professional Growth Webinars – Per Credit	Included	\$45	\$75
Professional Growth Webinars – Standard (3 Credits)	Included	\$125	\$165
Professional Growth Webinars – Extended (5–6 Credits)	Included	\$235	\$299
Virtual PD / Workshops – Per Credit	Included	\$45	\$75
Virtual PD / Workshops – Standard (3 Credits)	Included	\$125	\$165
Virtual PD / Workshops – Extended (5–6 credits)	Included	\$235	\$299

Workshops & Courses

(Not Included in Annual Learning Access)

Program	Member	Non-Member
ASB In-Person Training	\$235	\$299
Introduction to School Accounting	\$400	\$685
School Accounting 1	\$775	\$1,365
School Accounting 2	\$400	\$685
School Accounting 3	\$400	\$685

Business Manager Conference (BMC)

(Not Included in Annual Learning Access)

Description	Member	Non Member
Early Bird Registration	\$399	\$650
Regular Registration	\$449	\$650

Note:

Business Manager Conference registration rates reflect the **current pricing structure** and will be **reviewed in Fall 2026 for the 2027 event cycle**. Early bird pricing and registration timelines may be **adjusted as part of that review**.

Annual Conference Attendee Registration

Description	Member	Non Member
Early Bird Registration	\$395	\$725
Regular Registration	\$475	\$725

Note:

Annual Conference registration rates listed above reflect the **current pricing structure**. These rates will be **reviewed in Fall 2026 for the 2027 conference cycle**. Early bird pricing and registration timelines are **subject to change following that review**.

Annual Conference Exhibitor Fees

Early Bird – Ends November 15

Booth Type	Fee
Standard Booth	\$1,300
Premium Booth	\$1,600

Regular – Begins November 16

Booth Type	Fee
Standard Booth	\$1,500
Premium Booth	\$1,800

Additional Fees

Item	Fee
Additional Booth Representative	\$150
Booth Attendee Change Fee (after March 15)	\$150

Note:

Vendor/Affiliate members wishing to attend the Annual Conference must **purchase an exhibit booth in order to participate as an attendee**. Individual attendee registration is not available for Vendor/Affiliate members without a booth purchase.

Exhibitor booth pricing reflects the **current conference pricing model** and will be **reviewed in Fall 2026 for the 2027 conference cycle**. Early bird deadlines and pricing structures may be **adjusted following that review**.