



ARTICLE II | PUBLIC – EXTERNAL RELATIONSHIPS

SERIES 2000

This series of the Illinois ASBO Board Policies is intended to deal with the Association's external relations.

The policies contained herein deal with the mass media of communication, the public activities of the staff, the Association's legal activity, and its relationships with county, area, state, regional, and national organizations.

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*No adopted policy at present writing.

JOINT VENTURE & SPONSORED PROGRAMS

Policy adopted: 03/05/2009
Policy reviewed: 04/18/2013

Policy amended: XX/XX/XXXX
Policy renumbered: XX/XX/XXXX

This policy requires that the Illinois Association of School Business Officials (Illinois ASBO) evaluates its participation in joint venture and sponsored program arrangements under Federal tax law and take steps to safeguard the Association's exempt status with respect to such arrangements. It applies to any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity as further defined in this policy.

- A. **Joint ventures or similar arrangements with taxable entities.** For purposes of this policy, a joint venture or similar arrangement (or a "venture or arrangement") means any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity without regard to:
1. whether the Organization controls the venture or arrangement;
 2. the legal structure of the venture or arrangement; or
 3. whether the venture or arrangement is taxed as a partnership or as an association or corporation for federal income tax purposes. A venture or arrangement is disregarded if it meets both of the following conditions:
 - a. 95% or more of the venture's or arrangement's income for its tax year ending within the Organization's tax year is excluded from unrelated business income taxation including but not limited to:
 - (i) dividends, interest, and annuities;
 - (ii) royalties;
 - (iii) rent from real property and incidental related personal property except to the extent of debt-financing; and
 - (iv) gains or losses from the sale of property; and
 - b. the primary purpose of the Organization's contribution to, or investment or participation in, the venture or arrangement is the production of income or appreciation of property.
- B. **Safeguards to ensure exempt status protection.** The Association will:
1. negotiate in its transactions and arrangements with other members of the venture or arrangement such terms and safeguards adequate to ensure that the Association's exempt status is protected; and
 2. take steps to safeguard the Association's exempt status with respect to the venture or arrangement. Some examples of safeguards include:
 - a. control over the venture or arrangement sufficient to ensure that it furthers the exempt purpose of the Association;
 - b. requirements that the venture or arrangement gives priority to exempt purposes over maximizing profits for the other participants;
 - c. that the venture or arrangement not engage in activities that would jeopardize the Association's exemption; and
 - d. that all contracts entered into with the organization be on terms that are arm's length or more favorable to the Association.

LEGISLATIVE ACTIVITIES | NEW LEGISLATION

Policy adopted: 09/16/1981
Policy reviewed: 04/18/2013

Policy amended: 04/15/2010
Policy renumbered: XX/XX/XXXX

The Illinois Association of School Business Officials, having professional expertise and awareness of the need for on-going involvement in the legislative process will develop, through its External Relations Board Committee, its Delegate Advisory Assembly and its Public Policy and Intergovernmental Relations Professional Development Committee, a pro-active strategy of involving its members and key local contacts so as to affect policy and legislative outcomes that best serve its member's, students, taxpayers, statewide membership and associated constituents.

LEGISLATIVE ACTIVITIES | COMMUNICATION NETWORKS

Policy adopted: 09/16/1981

Policy reviewed: 04/18/2013

Policy amended: 06/14/2013

Policy renumbered: XX/XX/XXXX

Communications is a key word to proper policy and legislative activities of the Association. The membership cannot be moved to take action without proper and timely communication on various issues.

In order to assure the possibility of timely communication and feedback, it is a policy of the Board to initiate a communication network through the Delegate Advisory Assembly by e-mail whenever in its judgment the Board feels that such activities enhance the objectives of the Association.

Also, the Association's affiliation with Illinois Statewide School Management Alliance will ensure that the membership will be made aware of the key legislative issues. In addition, it is a policy of the Board of Directors to initiate a communication network with all members whenever in its judgment the Board believes that such activities enhance the objectives of the Alliance.

Reference: Illinois ASBO Minutes
January 17, 1980

ARTICLE II – PUBLIC/EXTERNAL RELATIONSHIPS

2410.1

LEGISLATIVE ACTIVITIES | ILLINOIS STATEWIDE SCHOOL MANAGEMENT ALLIANCE

Regulation adopted: 09/16/1981

Regulation reviewed: 04/18/2013

Regulation amended: 06/14/2013

Regulation renumbered: XX/XX/XXXX

In accordance with the Board of Directors' Policy, it shall be the practice of the Executive Director to become a part of the Illinois Statewide School Management Alliance network or to form its own Communication Network to promote the legislative interests of the Association.

The Executive Director, External Relations Board Committee, its Delegate Advisory Assembly and its Public Policy and Intergovernmental Relations Professional Development Committee shall inform the chairpersons of the other Professional Development Committees and Regional Organizations of important legislative developments.

LEGISLATIVE ACTIVITIES | LEGISLATIVE CONSULTANT

Policy adopted: 09/16/1981

Policy reviewed: 04/18/2013

Policy amended: 06/14/2013

Policy renumbered: XX/XX/XXXX

It is the belief of the Illinois ASBO Board of Directors that the position of its membership must be communicated and explained to the General Assembly of the State of Illinois.

Monitoring legislation, keeping the membership informed and involved, assisting and sponsoring legislation, arranging for people to testify before committees, providing copies of legislation, and attending appropriate meetings are all needs of the Association that must be dealt with directly by the Association. Therefore, the Board of Directors shall establish a position of Legislative Consultant and establish an annual budget, which shall include a salary and related expenses for the position.

The Executive Director shall maintain an administrative regulation that sets forth more specific indicators, job responsibilities and a Legislative Consultant Agreement for such consultant. The regulation will require periodic reports to the Board of Directors by the Consultant.

LEGISLATIVE ACTIVITIES | LEGISLATIVE CONSULTANT

Regulation adopted: 06/06/1983
Regulation reviewed: 04/18/2013

Regulation amended: 06/14/2013
Regulation renumbered: XX/XX/XXXX

The Legislative Consultant will:

1. Communicate, promote and advocate various legislative positions recommended by Illinois ASBO's Delegate Advisory Assembly (DAA) and approved by the Board to the General Assembly and the appropriate leadership and committees of each house of the General Assembly.
2. Serve as the Illinois ASBO representative on the Illinois Statewide School Management Alliance (Alliance) coordinating committee.
3. Provide for, organize, coordinate, and arrange for expert testimony, legislative analysis, dissemination of materials through the Alliance network, and develop, maintain and operate an Illinois ASBO communication network, either by e-mail or fax.
4. Perform other legislative functions as may from time to time be assigned by the Executive Director and/or the Board of Directors of Illinois ASBO.
5. Attend any Illinois ASBO regional meetings as required by the Executive Director, or in addition, as deemed appropriate by the legislative consultant.
6. Attend the monthly meeting of the Illinois Financial Accounting Committee as needed.
7. Attend ED-RED, SCOPE or other such meetings as appropriate.
8. Report verbally and/or in writing on a monthly basis to the Executive Director on the legislative consultant's activities, expenses, issues, concerns, etc.
9. Meet with the Illinois ASBO Board of Directors as requested.
10. Serve on the Public Policy & Intergovernmental Relations Professional Development Committee, as well as, the DAA as a member of the committee and work with its chair to accomplish the legislative goals and objectives of the Board.
11. Attend the Joint Conference and attend such sessions, delegate assemblies, etc. as available to develop background information that will be helpful in the legislative activities of the Association.
12. Organize professional development seminars that relate to member needs and the legislative process.
13. Attend the Annual Conference of the Association and, in cooperation with the chairperson of the Public Policy & Intergovernmental Relations Professional Development Committee, organize the Legislative Update session of the Annual Conference.
14. Develop such publication and newsletter articles as needed to communicate Association legislative positions and proposals.
15. The duties and responsibilities of the legislative consultant shall be all those duties incident to the role as defined, as set forth in Board Policy, imposed by Federal and/or state law, and the duties and responsibilities as communicated to the legislative consultant by the Executive Director or Board of Directors of Illinois ASBO.

Annually, the Board will establish a contract to include expenses. This will be paid monthly.

Request for extraordinary expenses will be submitted in advance to the Executive Director for approval and/or recommendation to the Board of Directors.

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LEGISLATIVE ACTIVITIES | STATE LEGISLATIVE ACTIVITIES

Policy adopted: 09/16/1981
Policy reviewed: 04/18/2013

Policy amended: 04/15/2010
Policy renumbered: XX/XX/XXXX

The Association recognizes that it must work deliberately and resolutely with the General Assembly of the State of Illinois.

Towards that end, the Association will support new legislation to promote and maintain the high standards of education in the State of Illinois.

The Association will be a member of the Illinois Statewide School Management Alliance and maintain umbrella liaisons and participation with other interested organizations in the State of Illinois to obtain these goals.

The Association will initiate legislation, when it is deemed appropriate, to enhance the effective and efficient use of resources available for public and higher education in Illinois and also to expand the resources available to education.

Reference: Illinois ASBO Resolution Committee Report
May 1978

ARTICLE II – PUBLIC/EXTERNAL RELATIONSHIPS

2510

RELATIONS WITH AGENCIES AND ORGANIZATIONS | MEMBERSHIPS OF THE EXECUTIVE DIRECTOR

Policy adopted: 09/16/1981
Policy reviewed: 04/18/2013

Policy amended: 05/04/1983
Policy renumbered: XX/XX/XXXX

In order to maintain a proper atmosphere in the professional community and to keep the Association informed of the activities, efforts, and goals of other organizations, the Executive Director shall maintain memberships in various organizations so related.

The dues are to be paid by the Association and must be approved each year by the Board of Directors.

The Executive Director shall be responsible for an administrative regulation, which shall include a list of current organizations.

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2510.1

RELATIONS WITH AGENCIES AND ORGANIZATIONS | MEMBERSHIPS OF THE EXECUTIVE DIRECTOR

Regulation adopted: 05/06/1983

Regulation reviewed: 04/18/2013

Regulation amended: 04/15/2010

Regulation renumbered: XX/XX/XXXX

The Association shall provide the membership dues for the Executive Director in the following professional organizations:

1. Association of School Business Officials International
2. Illinois Association of School Business Officials
3. American Association of School Administrators
4. Illinois Association of School Administrators
5. Illinois Principals Association
6. Illinois Association of School Boards
7. Association Forum of Chicagoland
8. American Society of Association Executives
9. Illinois Education Roundtable

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2520.1

RELATIONS WITH AGENCIES AND ORGANIZATIONS | ILLINOIS ASBO/NIU AGREEMENT | BUILDING RENTAL

Regulation adopted: 06/21/2001
Regulation reviewed: 04/18/2013

Regulation amended: 06/14/2013
Regulation renumbered: XX/XX/XXXX

It shall be the responsibility of the Executive Director to rent only to reputable organizations/individuals.

Rental schedule for the Henry Yankow Board Room:

1. No charge for the Leadership, Educational Psychology & Foundations Department and the Public Administration Department.
2. Fees, deposit and cancellation
 - a. 7 days in advance
 - b. Check to Illinois ASBO
 - c. Complete application form

1/2 day - 8:00 am-12:00 noon	\$50
1/2 day - 1:00 pm-5:00 pm	\$50
1/2 day - 7:00 pm-10:00 pm	\$50
Full day 8:00 am-5:00 pm	\$100
Full day 1:00 pm-10:00 pm	\$100

Use of kitchen	\$50 (refundable if kitchen is left clean)
Breakage/Damage Fee	\$100 (refundable if no breakage/damage)

- d. A full refund of fees and deposits will be made if notification of cancellation of the event is received by the Office Assistant 24 hours before the event. There will be no partial refunds.

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RELATIONS WITH AGENCIES AND ORGANIZATIONS | ILLINOIS ASBO/NIU COMMUNICATIONS

Policy adopted: 09/16/1981
Policy reviewed: 04/18/2013

Policy amended: 06/14/2013
Policy renumbered: XX/XX/XXXX

It is the desire of the Board and membership to maintain open, timely, and frequent communications with the appropriate staff of Northern Illinois University. The Association's relationship with NIU is of a special nature, and must be nurtured and promoted at every step.

The Executive Director shall be responsible for a program to accomplish this end.

Reference: Illinois ASBO Board of Directors' Minutes
August 23, 1978

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2540

RELATIONS WITH AGENCIES AND ORGANIZATIONS | ASBO INTERNATIONAL

Policy adopted: 09/16/1981
Policy reviewed: 04/18/2013

Policy amended: 09/29/1987
Policy renumbered: XX/XX/XXXX

The members of the Illinois Association of School Business Officials unanimously support the nominations and election of outstanding members to serve on the Board of Directors and/or as Officers of the Association of School Business Officials International.

Reference: Resolutions Committee Report
May 4, 1978

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2541

RELATIONS WITH AGENCIES AND ORGANIZATIONS | VISITING ASBO DIGNITARIES

Policy adopted: 09/16/1981
Policy reviewed: 04/18/2013

Policy amended: 06/14/2013
Policy renumbered: XX/XX/XXXX

ASBO International Candidates and their affiliate Executive Director or designee shall be invited to attend the Annual Conference of this Association and shall be provided with waived registration fees, regularly scheduled luncheons and/or dinners, and housing.

ASBO affiliates requesting to attend the Annual Conference shall be provided with waived registration fees, regularly scheduled luncheons and/or dinners, and housing for two attendees per affiliate. Additional attendees from same affiliate will be required to pay.

Visiting ASBO dignitaries will be invited to participate in the annual Foundation golf outing and all green fees and meal charges will be waived.

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2541.1

RELATIONS WITH AGENCIES AND ORGANIZATIONS | VISITING ASBO DIGNITARIES

Regulation adopted: 09/08/1982

Regulation reviewed: 04/18/2013

Regulation amended: 09/12/1989

Regulation renumbered: XX/XX/XXXX

On an annual basis, the President shall invite the current President of ASBO to be the guest of the Association during the Annual Conference. The Association may pay the expenses of the ASBO President, or his/her designee, and his/her spouse, for housing and meals, and waive the registration fees for the Conference.

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RELATIONS WITH AGENCIES AND ORGANIZATIONS | ASBO INTERNATIONAL | ENDORSEMENT OF ASBO AFFILIATE CANDIDATES

Policy adopted: 06/21/2001

Policy amended: 06/14/2013

Policy reviewed: 04/18/2013

Policy renumbered: XX/XX/XXXX

The Illinois Association of School Business Officials is regularly solicited to support a particular candidate for election to the Board of Directors of ASBO International. It shall be the policy of the Association to distribute candidate information to members, invite candidates to attend the Annual Conference and offer an opportunity for candidates to introduce themselves to the membership at the Annual Conference. However, the Association will not make an official endorsement of one candidate over another.

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2550

RELATIONS WITH AGENCIES AND ORGANIZATIONS | ILLINOIS ASBO/ISBE AGREEMENT

Policy adopted: 11/20/2003

Policy reviewed: 04/18/2013

Policy amended: XX/XX/XXXX

Policy renumbered: XX/XX/XXXX

To promote and maintain the high standards of education in the State of Illinois, the Association recognizes the importance of a reciprocal relationship between itself and the Illinois State Board of Education (ISBE).

ARTICLE II – PUBLIC/EXTERNAL RELATIONSHIPS

2550.1

RELATIONS WITH AGENCIES AND ORGANIZATIONS | ILLINOIS ASBO/ISBE AGREEMENT

Regulation adopted: 11/20/2003
Regulation reviewed: 04/18/2013

Regulation amended: 06/14/2013
Regulation renumbered: XX/XX/XXXX

1. ISBE Liaison(s)

Expectations: Attends all Board Meetings and works closely with the Assistant Executive Director in development of seminars using ISBE staff.

- a. Fees Waived – Dues, Seminars, Annual Conference
- b. Overnight accommodations and meals at Annual Conference, Board Retreat, Joint Conference
- c. Travel Reimbursements – Illinois ASBO Board Meetings, speaking at Illinois ASBO Seminars/Conference

2. Other ISBE Staff

Expectations: Present at Illinois ASBO seminars and serve on Illinois ASBO Professional Development Committees

- a. Discounted Membership Dues: \$100
- b. Discounted Annual Conference Fee:
 - Full Conference Registration - \$100
 - One Day Registration - \$ 50
- c. Discounted Seminar Fees – Equivalent to Basic Plus Membership
Pay for meals/materials only, if applicable
- d. Travel Reimbursements – Speaking at Illinois ASBO Seminars/Conference

Reference Regulation 6100.1

RELATIONS WITH AGENCIES AND ORGANIZATIONS | ILLINOIS ASBO/IASA/IASB NOVEMBER CONFERENCE

Policy adopted: 09/16/1981

Policy reviewed: 04/18/2013

Policy amended: 03/07/2001

Policy renumbered: XX/XX/XXXX

In order to facilitate the professionalism of the membership, and the communications between the Illinois Association of School Business Officials (Illinois ASBO), the Illinois Association of School Administrators (IASA), and the Illinois Association of School Boards (IASB), it shall be the policy of this organization to participate fully in the IASB, Illinois ASBO, IASA statewide November Joint Conference.

The Board of Directors further believes that this participation will provide opportunities for Board of Education members and school administrators to view and partake in some of the benefits of membership in Illinois ASBO.

To further facilitate the professionalism of its membership, it shall also be the policy of the Association to provide opportunities for members to make presentations, participate in the exhibits, and provide hospitality. From time to time other activities will be provided.

The Association will provide pre-conference opportunities to build and upgrade the skills of those who attend.

The Executive Director shall develop administrative regulations to facilitate the implementation of this policy.

Policy adopted: 04/07/1992
Policy reviewed: 03/04/2010

Policy amended: 04/15/2010
Policy renumbered: XX/XX/XXXX

The Illinois Association of School Business Officials recognizes that mutual self-interests exist between itself and the private sector in terms of the mission of the Association, its goals, objectives and membership services. Since the interests and needs of the Association and its membership can appropriately overlap with the needs and interests of the private sector, the Board will promote, explore and consider partnership arrangements that, from time to time, are presented to it. The Executive Director shall develop appropriate regulations that guide development of any such partnership.

All partnerships require communication to and eventual approval of the Board of Directors. The Executive Director may initiate partnerships on a trial basis for a period not to exceed one year. After the trial period, the Board of Directors will be asked to take action for the continuation of the partnership.

The Executive Director and the Board of Directors will consider partnerships based on the following criteria:

1. The partnership proposed is consistent with the purposes of the Association or a 501(c)3 organization.
2. The proposed partnership is consistent with the Mission of the Association.
3. The proposed partnership will provide a service to the member and/or the members employing agency not currently available.
4. The proposed partnership will provide a service better than currently available.
5. The proposed partnership will provide a service less expensively than currently available.

Regulation adopted: 04/07/1992
Regulation reviewed: 04/18/2013

Regulation amended: 06/14/2013
Regulation renumbered: XX/XX/XXXX

The Executive Director may pursue any partnership idea regardless of its origin if in his/her judgment the partnership is consistent with the mission of the Association and will enhance the profession of school business management.

Partnership ideas to provide products and/or services to the membership of the Association may originate from the private sector or from Illinois ASBO. In order for the Board to take action on any partnership, the following should be evaluated.

The partnership idea:

1. clearly relates to the mission, goals and objectives of the Association;
2. is within the legal limitations of the Association;
3. is not in conflict with other contracts or partnerships;
4. clearly defines and limits the commercial benefits in terms of distribution of materials with advertising;
5. encompasses the private sector agency's attributes that are crucial to the success of the partnership;
6. projects a positive image for the Association and the profession;
7. does not compete with an existing program or service;
8. clearly spells out the duties, roles, expectations and responsibilities of the Association and the private sector agency so that a formal agreement between both parties may be drafted and signed;
9. agreement shall in most instances be managed by the Association;
10. agreement in regards to the duration of the partnership and continuation conditions shall be fixed and specific. The agreement should initially be of sufficient length to allow the partnership to become firmly established, but in no case shall the partnership exceed 5 years. Renewals and extensions may be entered into, but may not exceed the 5 year limit;
11. relating to all reports, news releases and information concerning the partnership must be disseminated or approved in advance, by the Executive Director; and
12. shall heighten the esteem of the partners in the eyes of the general public and the members of the Association.

When the Executive Director determines that sufficient information is available based on the above twelve items, he shall submit the proposed partnership to the Board of Directors for appropriate action.

Any Service Associate member or potential Service Associate member may initiate a partnership idea. These will be dealt with on a case-by-case basis and on a first come, first served basis. An approved partnership agreement that comes from the private sector shall be protected for a period of 5 years. (This means that the idea will not be developed into a partnership between the Association and another Service Associate for at least five years.) In the event of separation of the partnership, the five year limitation is defunct.

When the potential partnership is initiated by the Association, the Association will develop a Request for Proposal (RFP). Said RFP to be sent to a selected "list" of companies and/or agencies that possess attributes, technical expertise, resources, and a public image suitable to meet the expectations of the proposed partnership.

1. The identification of potential "corporate/business" partners shall be brain stormed by the Board and staff -- final list to be approved by the Board following appropriate research. Attempts will be made to select NON competing companies when appropriate.
2. Each selected "list" shall be unique to the partnership being considered.