

# Illinois Association of School Business Officials

## PROFESSIONAL DEVELOPMENT COMMITTEE HANDBOOK

NOVEMBER 2016  
(Seventeenth Edition)



This handbook establishes an organizational structure, provides guidelines and presents information and direction for conducting the wide range of activities required to keep Illinois ASBO at the forefront of educational administration through its professional development and research functions.

Written and Compiled by:  
**Illinois ASBO Directors and Staff**

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## PREFACE

To Our Members,

I have often said that one of the things that Illinois ASBO does best is professional development. The primary reason for that is the unselfish and dedicated involvement of our members on professional development committees. This handbook is intended to give some structure to how those committees operate and to make sure that Illinois ASBO stays in the forefront when it comes to high quality, relevant and just in time professional development.

**Specifically, this handbook establishes a framework to:**

- Provide continuity for committee work from year to year and committee to committee.
- Specify for committee members and leaders what is expected of them to meet their responsibilities and how transitions of leadership will take place.
- Establish guidelines for committee activities to ensure that each committee is successful in serving the best interests of the membership.
- Ensure that professional development committees are central to the development of seminars, articles, publications and other committee reports that keep Association members up to date on the current issues in school business management.
- Restate our commitment to high quality presentation and ethical standards in all of our professional development seminars.

There is no doubt in my mind that the continual growth and maturation of Illinois ASBO members depends on the productivity of our professional development program and related activities. As this growth takes place, all members are strongly encouraged to participate and share their expertise with their colleagues. This is what makes Illinois ASBO the leader in professional development, not only here in Illinois, but across the nation.

Michael A. Jacoby, Ed.D., SFO, CAE  
Executive Director/CEO

A handwritten signature in black ink, reading "Michael A. Jacoby". The signature is fluid and cursive, with a large, stylized initial "M".

# BACKGROUND

## Illinois ASBO's Mission Statement

The **Illinois Association of School Business Officials** is devoted to the school business management profession. Our mission is to provide our members and stakeholders with a comprehensive range of professional development activities, services and advocacy through networking and participation.

## Illinois ASBO's Purpose

The purposes for which this Association has been formed are:

- A. To advance education at the elementary, secondary, college and postgraduate levels;
- B. To enable the members and the general public to better conduct the management of schools at all levels;
- C. To conduct research programs in the field of school administration, and to publish the results of such research;
- D. To engage in a program of education to improve the abilities of persons carrying on activities in the field of school administration;
- E. To advance education by promoting the highest standards of ethical conduct by persons carrying on activities in the field of school administration;
- F. To develop, promote and sponsor programs and services that members and school districts may utilize toward more effective use of resources; and
- G. To engage in any other lawful activity incidental to the foregoing purposes.

# PROFESSIONAL DEVELOPMENT COMMITTEE (PDC) OVERVIEW

## Introduction

Committees are a basic, fundamental force within associations and Illinois ASBO is no exception. It is organized on the volunteer committee principle. By definition, a committee is “a body of persons elected or appointed to attend to any matter or business referred to it, often a section of a larger body.” A volunteer is “a person who enters into any service of his/her own free will; a person who of his/her own free will offer services without the stipulation of being compensated financially or otherwise.” The key factor to a committee's success is the degree to which members accept their personal and professional responsibilities as an integral part of their volunteer effort. An important factor in the success of any individual serving on a committee is support from his or her employer.

Professional Development Committees, composed of current Illinois ASBO members, exist and function for specific purposes. These Committees receive Association support and bring the best available talent together

to meet assigned responsibilities. The Board of Directors has the authority to appoint various committees in accordance with established policies. All committees report to the Board of Directors. The Board of Directors identifies specialty areas in school business management in accordance with established policies and creates a Professional Development Committee in each area. The number and title of the Professional Development Committees may vary from time to time as deemed necessary to meet the mission of the Association.

## Objectives

In relation to the above mission statement, the objectives of the Professional Development Committees include, but are not limited to:

- Identifying, preparing and conducting professional development training opportunities and continuing education programs in the field of school business management.
- Promoting Illinois ASBO programs and activities to other associations, organizations, professionals, governmental entities, the general public and others.
- Recruiting new members.

## COMMITTEE ORGANIZATIONAL STRUCTURE

### Committee Leadership

Illinois ASBO emphasizes a leadership organizational structure for each Professional Development Committee where each leader is backed up by qualified professionals.

Because committees cannot operate without leadership, each Illinois ASBO Professional Development Committee is headed by a Chairperson. Each Chairperson and Vice Chairperson is approved by the Board of Directors of the Association. In addition to the basic qualifications, Chairpersons must have demonstrated leadership ability, make a commitment to attend the Annual Conference and all of his/her committee meetings and have the support of his/her employer in fulfilling defined Committee responsibilities. A potential Chair should have served at least one term as committee member on the committee he/she intends to lead.

The Chairperson directs and coordinates the work of the committee members with experience and demonstrated expertise in an identified specialty area of school business management in accordance with the Association's policies and guidelines (see Appendix A).

## Committee Membership

The key factor to a committee's success is the degree to which members accept their personal and professional responsibilities as an integral part of their volunteer effort. An important factor in the success of any individual serving on a committee is support from his or her employer.

Service on a Professional Development Committee is open to any interested member. To be considered for appointment to an Illinois ASBO Professional Development Committee, one must be a current, paid, Active, Life, Honorary, Emeritus, or Service Associate member of the Association with experience and/or interest in the committee's area of specialty to which he or she seeks appointment. The member must express a willingness to accept committee assignments and participate in committee activities, programs and projects.

A committee member, in order to be effective, can only serve on one committee and works under the direction of the committee's Chairperson and Vice Chairperson(s). All committee appointments are subject to the acceptance of the committee's Chairperson.

To ensure active participation and an adequate level of activity, the Board of Directors reserves the right to remove a committee member from a specific assignment if that member is uncooperative with the committee leaders and other committee members; does not accept his or her committee responsibilities; fails to meet his or her committee commitments; or abuses the position in a manner detrimental to the Association.

# Sample Organizational Committee Structure

Illinois ASBO Board of Directors PDC Liaison  
PDC Chairperson  
PDC Vice Chairperson  
PDC Members

## Illinois ASBO Board of Directors' Responsibilities

A member of the Board of Directors serves on each Professional Development Committee as a Board Liaison. The role of the board liaison is to:

- Report on PDC activities to the Board of Directors and advocate for the PDC to ensure the Board is apprised of current issues from the committee;
- Serve as a resource for the PDC;
- Update the PDC on the association's strategic plan;
- Work with the PDC to meet the needs of the greater membership;
- Actively attend the quarterly PDC networking meetings;
- Provide leadership and direction; and
- Assist in succession planning.

## Chairperson's Responsibilities (+)

The Chairperson is the overall leader of each committee and is required from time to time, to report on the committee's activities, programs and projects to the Board of Directors and Headquarters staff (see the Illinois ASBO Chair/Vice Chair Guidebook in Appendix B).

### *Administrative*

- Prepare objectives and timelines to accomplish goals as determined by the Board of Directors;
- Plan and hold a minimum of two meetings of their committee per year. Meetings may be face-to-face or virtual, but must include at least one of the following: the chair, vice chair or board liaison;
- Create agendas to aid in the facilitation of the committee meeting, when applicable;
- Recruit new committee members;
- Contact inactive committee members to discuss interest and participation. The Chair should communicate that to remain on the distribution list, members should actively participate in at least one PDC Meeting per year. If interest has changed or attendance is not anticipated or achieved, the Chair should remove the member from the distribution list.
- Recommend to the Board Liaison the appointment of a Vice Chair from the committee membership and assign duties and responsibilities as deemed appropriate;
- Promote members from committee to run for Board of Directors; and
- Select delegate and alternate for the Delegate Advisory Assembly.

### *Seminars*

- Develop seminars, which may include offerings for Academy approval or Designation Programs; and
- Coordinate all aspects of seminar presentations, including speakers, dates, times, etc. with the Illinois ASBO Professional Development Team and PDC Coordinator or designate another member to do so.

### *Annual Conferences*

- Develop sessions to be presented at Illinois ASBO's Annual Conference;
- If applicable, also develop sessions at ASBO International and the IASB/IASA/IASBO Joint Annual Conference; and



- Coordinate all activities regarding speakers, dates, times, etc. with the Illinois ASBO Professional Development Team and PDC Coordinator or designate a committee member to do so.

## Vice Chairperson's Responsibilities (+)

- The Vice Chairperson(s) assumes responsibilities as assigned by the Chairperson and in conjunction with the goals of the committee (see the Illinois ASBO Chair/Vice Chair Guidebook in Appendix B);
- Compile minutes or a list of decisions made and action items to be distributed to the PDC members and to the staff liaison for posting on the Association's website;
- Ensures that new committee members are mentored and offered opportunities to expand their presentation skills; and
- It is recommended to read the following book on presentation skills - Public Speaking: The Ultimate Public Speaking Guide on How To Deliver a Ted Talk - Presentation Secrets of the World's Best Speakers. Write & Deliver The Ultimate Presentation!

## Committee Member Responsibilities

The specific responsibilities of committee members fall into two areas: general responsibilities and Annual Conference responsibilities.

The general responsibilities of a committee member are to:

- Communicate with committee members and leadership to aid in reaching the Committee's goals and objectives;
- Accept committee assignments as assigned by committee and ensure the timely completion of committee activities, seminars and breakout sessions;
- Provide input to committee leaders on potential, expanded and/or new committee activities, programs and projects;
- Assist committee leaders in reaching the committee's goals and objectives;
- Assume other responsibilities as assigned by the Committee's leaders; and
- Recruit new members.

Annual Conference responsibilities of a committee member are to:

- Attend and participate actively in the
  - Annual Conference.
  - Professional Development Committees' meeting held in conjunction with the Association's Annual Conference.
- Participate in the programs the committee presents during the Annual Conference as a presenter, coordinator, moderator or panelist; and
- Provide input and make recommendations to committee leaders on improving and/or expanding committee activities during future Annual Conferences.

Processes to keep content relevant:

- Attendees fill out a session evaluation form
- Evaluation form asks if the topic is relevant and helpful
- Staff compiles comments and sends them back to the PDC Chair, presenters and session coordinator.
- PDC discusses feedback and incorporates changes in future presentations (+).

# APPROVAL PROCESS

## Chairperson

Chair turnover will take place during the Annual Conference PDC Meeting. Chairs will report leadership turnover to Board Liaisons and Illinois ASBO staff who will then notify the Board. The Illinois ASBO Board of Directors will approve PDC Chair and Vice Chair appointments at either the pre or post Annual Conference Board meeting. Terms will last two years and operate on a staggered basis so not all leadership roles need to be filled at any one time. Leadership terms will begin at the Annual Conference and expire after the second year of service. A PDC leader may apply for a second consecutive two-year term. Chairs may be approved to serve in a leadership role for two terms but must wait three years before serving again as a committee chair or vice chair. They may, however, continue on the committee as members. Interim appointments may be made at any time to fill unexpected vacancies. Vice Chairs will succeed Chair after two years pending Board approval. The Chair will remain on as Past Chair through the year-end as mentor (+). Illinois ASBO staff will notify Chairs and Board liaisons of term limit expirations. (+)

## Vice Chairperson

Vice Chairpersons are appointed to two-year terms and may be reappointed by the committee Chairperson, with Board approval after term is completed.

These appointments can become effective at any point in the year, but all appointments expire or are subject to reappointment at the end of the Association's fiscal year in conjunction with Annual Conference.

Vice Chairpersons will transition into two-year term as Chair, pending Board approval, once the term of the current Chair expires. (+)

## Members

Members can join a specific Professional Development Committee upon request and/or by recommendation because of their interest, experience or expertise in the committee's identified specialty area and are responsible for assuming and completing assignments relative to committee activities in accordance with the Association's bylaws, policies and guidelines. The committee Chairperson makes such appointments.

Members may change which PDC they choose to participate in. Members may switch PDCs by following the steps outlined below: (+)

- Members can change PDCs at the Annual Conference PDC Networking Meeting.
- To change, a PDC member must inform the Chair of their current PDC of their desire to change PDCs and then notify the Chair of the new PDC of their intention to join.
- The member must ensure that they are taken off the distribution list of the old PDC and added to that of the new after they notify the Chairs of their intention to switch PDCs.

# PROFESSIONAL DEVELOPMENT COMMITTEE MISSIONS

## Accounting, Auditing & Financial Reporting

Mission: To enhance members' understanding of the intricacies of accurate financial accounting and reporting to prepare for independent audits and communicate results with stakeholders. They work to help improve planning and accountability between business officials and the public, including students, school board members, employees, vendors, bond-holders, media and all other interested parties. The committee is composed of Illinois ASBO members who are experienced and knowledgeable in financial reporting, auditing, budgeting and accounting. They are always ready to welcome members of any experience level to bring their insights and questions.

## Budgeting & Financial Planning

Mission: To prepare school business officials to become fiscal leaders in all aspects of budgeting and financial planning. The Budgeting & Financial Planning PDC is committed to helping school business officials throughout the budgeting process: from budget preparation and analysis to communication to stakeholders.

## Cash Management, Investments & Debt Management

Mission: To provide professional development activities and information for school business officials and staff on cash flow management, banking, investments, financial services, underwriting, debt management and similar aspects of school finance.

## Food Service

Mission: The food service PDC is dedicated to identifying and providing practical solutions to Illinois ASBO members facing challenges in administering a compliant and fiscally responsible food service program. The Food Service PDC sees an opportunity to provide healthier meals for students and a healthier bottom line for districts. Practically speaking, they accomplish this through:

- Developing professional development at Annual Conference and other seminars;
- Communicating to members that they are ready to answer questions;
- Providing information to help school business managers choose which way is best for their district: self operate or contract out; and
- Facilitating open-ended discussion that allows everyone to bring their questions and suggestions to the table.

## Human Resource Management

Mission: The Human Resource Management PDC informs school business officials on changes to benefits that may affect their employees and budgets by providing timely seminars, white papers, online resources and discussions of important issues. They discuss and inform school business officials on human resource management issues including: employment practices, training, evaluation and retention of school staff, collective bargaining, negotiation strategies, benefit programs, contract administration, grievance resolution and legal issues.

## Leadership Development

Mission: To facilitate the advancement of effective leadership skills of the school business official by providing creative, timely and valuable professional development opportunities, resources and peer collaboration.

## Legal Issues

Mission: To serve the membership by meeting their need for information related to the laws and regulations of school business, ranging from current issues to a deeper understanding of familiar ones. The Legal Issues PDC focuses on activities including legal developments affecting school personnel, technology, the sale and acquisition of school properties and any other area of school business that has legal ramifications.

## Maintenance & Operations

Mission: The Maintenance & Operations PDC helps school business officials understand and demonstrate the ability to:

- Administer procedures required to keep schools clean, safe and secure through effective custodial services and preventive maintenance;
- Manage energy consumption and environmental aspects;
- Determine resource allocation for maintenance and operations;
- Develop a crisis management plan; and
- Maintain a positive working relationship with staff, contractors and suppliers.

## Planning & Construction

Mission: The Planning and Construction PDC helps educators understand the impact of the physical environment on teaching and learning through:

- Providing seminars and resources on current trends and best practices in delivering a high performance learning environment;
- Educating vendors on how to be proactive in helping their clients be more knowledgeable in the planning and construction process; and
- Helping facilitate understanding of the planning and construction process from start to finish and answering planning and construction-related questions or issues.

## Principles of School Finance

Mission: To provide learning opportunities for Illinois ASBO members to explore current and future school finance issues and examine their influence on school operations. The Principles of School Finance PDC:

- Advances understanding of the impact of school finance issues on school operations.
- Develops programs and presents activities regarding the equity, adequacy and efficiency of school expenditures and revenues.

## Public Policy & Intergovernmental Relations

Mission: To develop and employ the skills necessary to interpret, evaluate and respond to proposed legislation and regulations that affect school districts. The Public Policy PDC aims to help school business officials:

- Interpret proposed legislation and regulations so that impact can be analyzed and responses developed.
- Develop the skills useful in interacting with elected and appointed officials.

## Purchasing

Mission: To promote and encourage professional expertise and growth in public purchasing by actively interchanging ideas and experiences. The Purchasing PDC helps school business officials understand and demonstrate the ability to:

- Develop a system to manage and track inventories and distribution;
- Develop a program for the acquisition, maintenance, repair and disposal of equipment;
- Develop a system for the financial analysis of life cycle costs and quality control; and
- Develop a system to track capital assets.

They focus on:

- Current methods of procurement of supplies, equipment and services needed to operate school entities.
- Specification writing, supply management, customer service and legal and ethical issues.

## Real Estate Management

Mission: To help school business officials understand and demonstrate the ability to:

- Develop procedures for the acquisition and disposal of land and buildings;
- Coordinate with other governmental agencies regarding zoning, land use and other real estate issues; and
- Develop real estate management policies and procedures.

## Risk Management

Mission: To develop information to meet the insurance needs of the school district, determine coverage needed, establish insurable values of buildings and their contents and determine filing claims.

## Special Education: Administration & Finance

Mission: To create opportunities for school business officials to learn, network, share and solve problems on current topics in special education administration and finance that are impacting districts. The Special Education: Administration & Finance PDC believes that every business manager needs to:

- Understand that they are an important part of their district's special education program;
- Understand funding of special education in Illinois; and
- Optimize these funding methods.

## Sustainability

Mission: The Sustainability PDC will provide information empowering school communities to create an environmentally, socially and fiscally sustainable future.

## Technology

Mission: To help school districts leverage technology to enhance sustainability and learning. The Technology PDC works to create professional development opportunities that:

- Make technology easier to use in day-to-day responsibilities of school business officials;
- Enhance and facilitate technology in the classroom;
- Relate technology to curriculum; and
- Increase ubiquity – the state or capacity to be everywhere at all times.

## Transportation

Mission: School transportation is the largest public mass transportation system. As the number of operating school buses increases, problems are inevitable. For many school districts there is no mandate to provide students with transportation to or from school. Accordingly, school transportation funding does not always receive as high a priority in budget decisions as mandated education programs. Where law requires transportation of students to and from school, funding shortfalls in recent years have created problems in maintaining an adequate school transportation program.

The Transportation PDC helps school business officials understand and demonstrate the ability to:

- Support and maintain a student transportation program that adheres to all legal requirements;
- Ensure that the school bus maintenance and replacement program is established and maintained;
- Monitor the student transportation program and make adjustments as needed;
- Analyze alternative methods available for providing transportation;
- Ensure an efficient and comprehensive routing system is developed and maintained;
- Ensure a comprehensive plan is in place for training and retaining bus drivers; and
- Communicate transportation needs to the public, administration and state/provincial legislatures.

# Appendix A - ILLINOIS ASBO POLICY – PROFESSIONAL DEVELOPMENT COMMITTEES

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8600

### PROFESSIONAL DEVELOPMENT COMMITTEES

Policy adopted: 09/16/1981

Policy amended: 01/18/1996

Policy reviewed: 06/12/2015

Policy renumbered: XX/XX/XXXX

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The Association recognizes the importance of Professional Development committees and their value to school business management and the enhancement of the Association.

In addition, the Association recognizes the need to prepare future Association leadership by providing a means whereby members may make substantive contributions.

Therefore, the Association shall annually establish a series of committees to facilitate Association goals.

Reference: Illinois ASBO Bylaws

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8600.1

### PROFESSIONAL DEVELOPMENT COMMITTEES

Regulation adopted: 09/16/1981      Regulation amended: 06/12/2015

Regulation viewed: 06/12/2015      Regulation renumbered: XX/XX/XXXX

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In accordance with the Board of Directors' policy, the following committees are established as Professional Development Committees:

1. Accounting, Auditing & Financial Reporting
2. Budgeting & Financial Planning
3. Cash Management, Investments & Debt Management
4. Food Service
5. Human Resource Management
6. Leadership Development
7. Legal Issues
8. Maintenance & Operations
9. Planning & Construction
10. Principles of School Finance
11. Public Policy & Intergovernmental Relations
12. Purchasing
13. Real Estate Management
14. Risk Management
15. Special Education: Administration & Finance
16. Sustainability
17. Technology
18. Transportation



## ARTICLE VIII – COMMITTEES AND LIAISONS – 8610

### PROFESSIONAL DEVELOPMENT COMMITTEES | ACTIVITIES – EDUCATIONAL SURVEYS AND QUESTIONNAIRES

Policy adopted: 12/08/1993

Policy amended: 04/19/2012

Policy reviewed: 06/12/2015

Policy renumbered: XX/XX/XXXX

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Professional Development Committees are encouraged to provide relevant information and data for the membership of the organization. On occasion, a survey of the membership or other segments of the educational and business communities by a Professional Development Committee may be desirable. Professional Development Committees shall adhere to the following procedures when conducting and distributing the results of surveys and questionnaires:

1. Surveys and questionnaires shall reflect the goals and objectives of the organization.
2. Surveys and questionnaires shall be designed to ensure a high degree of reliability and validity.
3. All surveys and questionnaires shall be submitted to the Executive Director and/or the Deputy Executive Director for approval prior to distribution.
4. Results shall be reviewed with the Executive Director and the Deputy Executive Director prior to distribution to the membership.
5. Distribution of results to outside organizations or individuals, under such conditions, shall be approved by the Board of Directors.

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8620

### PROFESSIONAL DEVELOPMENT COMMITTEES | EXPENSE REIMBURSEMENTS

Policy adopted: 06/14/2013

Policy amended: XX/XX/XXXX

Policy reviewed: 06/12/2015

Policy renumbered: XX/XX/XXXX

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Expense reimbursement to committee members for official PDC travel, excluding the annual conference, will follow Illinois ASBO's travel reimbursement policy.

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8630

### PROFESSIONAL DEVELOPMENT COMMITTEES | MATERIAL DEVELOPMENT

Policy adopted: 06/14/2013

Policy amended: 06/12/2015

Policy reviewed: 06/12/2015

Policy renumbered: XX/XX/XXXX

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In the event that an individual serves on a Professional Development Committee, all products generated by the PDC become sole property of Illinois ASBO and no member of the PDC may use the project deliverables and intellectual properties or any other works of the group to derive personal gain.

Project deliverables and intellectual properties are defined as, but not limited to, the following: audio and/or video recordings, articles, white papers, articles for UPDATE, webinars, Keynote and PowerPoint presentations.

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8640

### PROFESSIONAL DEVELOPMENT COMMITTEES | COMMITTEE MEMBERS

Policy adopted: 06/04/1991

Policy amended: 06/14/2013

Policy reviewed: 06/12/2015

Policy renumbered: 06/14/2013

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The Illinois ASBO Board of Directors believes in and supports the active involvement of its members and Service Associates as Professional Development Committee members. All committees serve to benefit the greatest number of Illinois ASBO members possible and to advance the school business management profession.

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8640.1

### PROFESSIONAL DEVELOPMENT COMMITTEES | COMMITTEE MEMBERS

Regulation adopted: 04/06/1991 Regulation amended: 06/12/2015

Regulation reviewed: 06/12/2015 Regulation renumbered: 06/14/2013

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Members are appointed to specific Professional Development Committees upon request and/or by recommendation because of their interest, experience or expertise in the committee's identified specialty area and are responsible for assuming and completing assignments relative to committee activities in accordance with the Association's Bylaws, policies and guidelines. Such appointments are made after consultation between the Professional Development Committee Chair and the Deputy Executive Director.

Any qualified member can seek appointment to a Professional Development Committee by asking to join a PDC at any one of the PDC Networking meetings. Every effort will be made to appoint a member to the Professional Development Committee of his/her choice.

Professional Development Committee member appointments become effective at any point during the calendar year, and may last for as long as the member remains in good standing. Members may serve on only one Professional Development Committee at any given time and will work under the direction of the committee's Chair and Vice Chair. Opportunities and recognition in the association's publications, Website and database are based on the active participation of the member in assisting the PDC to achieve its goals and objectives. If the board of directors deems that a member does not uphold Illinois ASBO's Code of Ethics, he or she may be removed from the committee prior to the end of his or her term if deemed necessary by the Board Liaison, Chair, Vice Chair or large group of committee members.

In addition to members, Service Associates may also serve on Professional Development Committees as resource persons. To be considered for appointment as a vendor representative to a Professional Development Committee, one must be a current Service Associate member of the Association; must be employed by a firm providing products and/or services to the school field; have his/her firm's support for and approval of the appointment; and must have demonstrated expertise and recognizable skills in the committee's specialty area. Vendor representatives may qualify for Vice Chair positions but may not serve as Chair, unless the Chairmanship goes unfilled.

Applicable Editorial Advisory Board positions will be filled by PDC members and appointed by the Executive Director upon the recommendation of the Deputy Executive Director.

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8640.2

### PROFESSIONAL DEVELOPMENT COMMITTEES | LIAISON ROLES

Policy adopted: 06/14/2013

Policy amended: 06/12/2015

Policy reviewed: 06/12/2015

Policy renumbered: XX/XX/XXXX

#### BOARD LIAISON

A member of the board of directors serves on each Professional Development Committee as a board liaison. The role of the board liaison is to:

1. Report on PDC activities to the board of directors and advocate for the PDC to ensure the board is apprised of current issues from the committee.
2. Serve as a resource for the PDC.
3. Identify and recommend to the board of directors leadership succession at the chair and vice chair levels within the PDC.
4. Update the PDC on the association's strategic plan.
5. Work with the PDC to meet the needs of the greater membership.
6. Actively attend the quarterly PDC networking meetings.

#### STAFF LIAISON

A member of the Illinois ASBO headquarters staff supports the PDC. The staff support role includes, but is not limited to, the following:

1. Maintain contact with the PDC chair and vice chair throughout the year.
2. Work with the chair to confirm membership and to identify the PDC members named in the annual PDC Leadership Book and on the Association's website.
3. Assist the PDC in planning seminars and breakout sessions.
4. Maintain the speaker resource web page for conferences.
5. Promote committee membership.
6. Post committee meeting agendas and minutes on the Association's website.
7. Provide seminar and breakout session evaluations to the PDC chair, vice chair, board liaison, presenters and moderators of the presentation in a timely and efficient manner.
8. Support the PDC networking meetings.

## ARTICLE VIII – COMMITTEES AND LIAISONS – 8650

### PROFESSIONAL DEVELOPMENT COMMITTEES | COMMITTEE CHAIRS

Policy adopted: 09/16/1981

Policy amended: 06/12/2015

Policy reviewed: 06/12/2015

Policy renumbered: 06/14/2013

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The Illinois ASBO Board of Directors believes that a Professional Development Committee can function more effectively with a well-defined role for its leader.

Therefore, a list of job responsibilities for the Professional Development Committee Chairs shall be formulated as an administrative regulation.

A Professional Development Committee Chair shall be a currently employed voting Active member. Should a Chair cease to be employed, that person has until the end of the second fiscal year (June 30th) following the beginning of unemployment to obtain employment or that person must forfeit the Chair position. A Professional Development Committee Chair should encourage leadership in the Professional Development Committee by working with the board liaison to cultivate a Vice Chair to assume some of the responsibilities.

The Board of Directors reserves the right to appoint and remove Professional Development Committee Chair when it deems doing so is in the best interests of the membership and/or the Association.

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Professional Development Committee Chairs shall be directly responsible to the Deputy Executive Director. In addition, a designated member of the Board of Directors shall act as liaison to their assigned committee(s).

#### APPOINTMENT PROCESS

Chair turnover will take place during the Annual Conference PDC Networking Meeting. Chairs will report leadership turnover to Illinois ASBO staff and the staff will notify the Board. The Illinois ASBO Board of Directors will approve Professional Development Committee Chair and Vice appointments at the post Annual Conference Board meeting in June. Terms will last two years, and operate on a staggered basis so not all leadership roles need to be filled at any one time. Leadership terms will begin at the annual meeting and expire after the second year of service. A PDC leader may apply for a second consecutive two-year term. Chairs may be approved to serve in a leadership role for two terms but must wait three years before serving again as a committee chair or vice chair. They may, however, continue on the committee as members. Interim appointments may be made at any time to fill unexpected vacancies.

The Illinois ASBO Board of Directors will engage with their assigned PDCs to get to know the members of the PDC and identify leadership succession. When a term is about to expire, the Director will work with the PDC members to identify and recommend new leadership for the committee. The Director will take into account the candidate's recognized leadership and technical expertise in the committee's interest area(s), his or her previous involvement with the PDC, recommendations of committee members, contributions to the PDC and overall committee and membership feedback. Individuals being considered for a leadership role must have at least one year on the PDC before serving in a leadership capacity. The Director will recommend to the Board of Directors both a chair and vice chair for their assigned committee. The Board of Directors shall take action to appoint all committee chairs and vice chairs at a regularly scheduled meetings. (Note: The Board may waive these requirements if necessary in the best interest of Illinois ASBO.)

In the event that an untimely resignation or dismissal of a chair or vice chair occurs between meetings of the Board of Directors, the Executive Director and/or the Deputy Executive Director may make an interim assignment that will be terminated upon Board appointment of a permanent chair or vice chair.



## DUTIES AND RESPONSIBILITIES

1. Prepare objectives to accomplish goals as determined by the Board of Directors;
2. Plan and hold a minimum of two meetings of their committee per year. Meetings may be face-to-face or virtual, but must include a minimum of four committee members and at least one of the following: the Chair, Vice chair or Board Liaison;
3. Create agendas to aid in the facilitation of the committee meeting;
4. Compile minutes or a list of decisions made and action items and be distributed to the PDC members and to the staff liaison for posting on the Association's website (can be done by the PDC Chair or a committee member assigned by the Chair);
5. Recruit committee members with whom the Chair can effectively work and who will actively pursue committee objectives;
6. Recommend to the Board Liaison the appointment of a Vice Chair from the committee membership and assign duties and responsibilities as deemed appropriate;
7. Plan programs for the Annual Conference and preside at the sectional meetings of their respective committees;
8. Propose, endorse and sponsor onsite and online seminars in accordance with approved guidelines (cf. Article VII 7200);
9. Provide input for proposed or pending legislation;
10. Provide items for the UPDATE magazine and The Journal of School Business Management; and
11. Assist the Association by reviewing certain research as to its validity, reliability and practicality of application including books, masters' theses, doctoral dissertations, special papers, independent studies, etc.

In implementing the above, there will be no Illinois ASBO commitment of funds without pre-approval by the Board of Directors and/or the Executive Director.

There shall be at least one meeting of the Board of Directors at which time goals will be discussed with committee Chairs. It is extremely important that Chairs make every attempt to attend this meeting so that they may have input on these goals. In this way, committee Chairs can write and execute committee objectives more effectively.

## Appendix B – Illinois ASBO PDC Chair/Vice Chair Guidebook

### Job Duties and Responsibilities

#### **Past-Chair Duties** (Through Calendar Year End)

- Mentor for Chair and Vice-Chair
- Finish any duties involved in as Chair that are not completed during a nomination year.

#### **Chair Duties (+)**

The Chairperson is the overall leader of each committee and is required from time to time, to report on the committee's activities, programs and projects to the Board of Directors and Headquarters staff.

##### *Administrative*

- Prepare objectives and timelines to accomplish goals as determined by the Board of Directors;
- Plan and hold a minimum of two meetings of their committee per year. Meetings may be face-to-face or virtual, but must include at least one of the following: the chair, vice chair or board liaison;
- Create agendas to aid in the facilitation of the committee meeting, when applicable;
- Recruit new committee members;
- Recommend to the Board Liaison the appointment of a Vice Chair from the committee membership and assign duties and responsibilities as deemed appropriate;
- Promote members from committee to run for Board of Directors; and
- Select delegate and alternate for the Delegate Advisory Assembly.

##### *Seminars*

- Develop seminars, which may include offerings for Academy approval or Designation Programs; and
- Coordinate all aspects of seminar presentations, including speakers, dates, times, etc. with the Illinois ASBO Professional Development Team or designate another member to do so.

##### *Annual Conferences*

- Develop sessions to be presented at Illinois ASBO's Annual Conference;
- If applicable, also develop sessions at ASBO International and the IASB/IASA/IASBO Joint Annual Conference; and
- Coordinate all activities regarding speakers, dates, times, etc. with the Illinois ASBO Professional Development Team or designate a committee member to do so.

#### **Vice-Chair Duties (+)**

- The Vice Chairperson(s) assumes responsibilities as assigned by the Chairperson and in conjunction with the goals of the committee;
- Compile minutes or a list of decisions made and action items to be distributed to the PDC members and to the staff liaison for posting on the Association's website;
- Ensures that new committee members are mentored and offered opportunities to expand their presentation skills; and
- It is recommended to read the following book on presentation skills - Public Speaking: The Ultimate Public Speaking Guide on How To Deliver a Ted Talk - Presentation Secrets of the World's Best Speakers. Write & Deliver The Ultimate Presentation!

## **Service Associates – Code of Ethics**

### **BASIC BELIEFS**

Service Associate members of the Illinois Association of School Business Officials are committed to conducting themselves within the highest standards of professional and personal ethics, to continuing ongoing professional growth and development and to developing these beliefs in others with whom they work.

Members assume the responsibility for providing professional leadership in their respective fields. This responsibility requires members to maintain standards of exemplary personal and professional conduct. To these ends, service associate members subscribe to the following standards.

### **ETHICAL STANDARDS**

In all activities, members in good standing of Illinois ASBO shall:

- Make the well-being of all members and guests, a fundamental value in all decision making and actions.
- Fulfill professional responsibilities with honesty and integrity, and foster mutual respect between all members and guests.
- Support the principle of due process and protect the civil and human rights of all individuals.
- Obey all local, state and national laws.
- Implement the policies and administrative rules and regulations of the employing organization.

### **ETHICAL CONDUCT**

In all activities, members in good standing of Illinois ASBO shall demonstrate their adherence to the standards set forth above by:

- Actively supporting the goals and objectives of the Association and organizations with which they work.
- Interpreting the policies and practices of the Association fairly and objectively.
- Assisting fellow members, as appropriate, in fulfilling their obligations and goals of the Association.
- Supporting a positive image of the Association and educational institutions.
- Maintaining confidentiality of non-public data and information.

### **EXPECTATIONS OF PERSONAL AND PROFESSIONAL INTEGRITY**

In the conduct of business and discharge of responsibilities, each member will:

- Conduct business and transactions honestly, openly and with integrity, dignity and decorum.
- Make an appropriate effort to disclose potential conflicts of interest involving relationships between the firm and any school district employees or public officials.
- Refrain from unprofessional behavior and / or negative comments towards another member and their organization, including in the use of social media and websites.
- Never accept or offer illegal payment for products or services rendered. Never solicit members for donations at or during association sponsored events.
- Actively support the Association's professional development activities aimed at improving school business management and encourage colleagues to do likewise.

## **GUIDELINES FOR PRESENTATIONS: Seminars and Annual Conference Sessions**

- Presenters representing vendors are not to market/advertise their particular products at presentations. Presentation content and materials distributed may be proprietary but must be made available to all participants. This is to protect presentations from becoming marketing venues for particular products or services and also to ensure that other vendors attending presentations are not excluded from receiving any handouts that are distributed.
- The only presentations that may promote the sale of a certain program or service are those that are highlighting services or programs created by Illinois ASBO. These programs currently include; Procurement Card (p-Card), Forecast5, US Communities, the Illinois School District Liquid Asset Fund (ISDLAF+), and the Illinois Energy Consortium (IEC).
- Attendees at presentations who represent a product or service associated with the topic of the presentation are expressly prohibited from entering into competitive or confrontational questioning of presenters. In addition, a presenter is prohibited from making disparaging remarks about competitors or marketing via the audience or grandstanding to deliver a message regarding their particular product or service. This applies both during and after a presentation. Attendance should be for professional development and not for competing with other attendees or presenters. This is to keep our presentations from becoming combative settings where presenters or attendees are challenged regarding their products or services.
- Moderators at presentations are given the authority to ask any member of the audience to leave the session if they become combative with presenters or attendees. In addition, if a vendor is a presenter and uses the presentation as an arena to "sell" their product or services, the Moderator has the authority to stop the presentation if the presenter refuses to modify the content of their presentation. The Moderator will report such actions to the Deputy Director for follow-up.
- In the event that a member, other than those identified above, identifies an inappropriate member practice or behavior, the proper response would be to first discuss that issue with the offending member. If that does not resolve the issue, then notify the Executive Director or Deputy Executive Director.
- Violations and/or repeated violations may result in exclusion of those individuals or their companies from participating in future presentations, exhibiting and possibly membership in the Association.

## **GUIDELINES FOR PRESENTATIONS: Service Associate Seminars and Annual Conference Sessions**

The following regulations have been established to protect our presentations from becoming marketing venues for particular products or services. In addition, to ensure that if registered and participating vendors are part of the audience, that they are not excluded from receiving any handouts that are distributed by competing vendor presenters. Any vendor presenter who violates these regulations may be excluded from presenting at future presentations, in addition, to loss of membership in the Association.

### **Regulations for Vendor Presenters:**

Presentations are not intended as a marketing venue for particular products or services, but as a general educational venue. Presenters representing vendors are not to market or advertise their particular product at presentations. Presentation content and materials distributed may be proprietary but must be made available to all participants. Competitive vendors attending presentations shall not be excluded from receiving handouts that are distributed.

### **Regulations for Vendors Who Register and Attend Presentations:**

Attendance at presentations should be for professional development. Vendor attendees who represent a product or service associated with the topic of the seminar are expressly prohibited from entering into competitive or combative questioning of presenters. In addition, a presenter is prohibited from making disparaging remarks about competitors or marketing via the audience or grandstanding to deliver a message regarding their particular product or service. This applies both during and after a presentation. Attendance should be for professional development. It should not become a combative forum where other attendees or presenters are challenged regarding their products or services.

### **Moderators of Presentations:**

Moderators at presentations are given the authority to ask any attendee in the audience to leave if they become combative with presenters.

### **Exception:**

The only presentations that may promote the sale of a certain program or service are those that are highlighting services or programs currently created and/or sponsored by Illinois ASBO. These programs currently include: Procurement Card (p-Card), Forecast5, US Communities, the Illinois School District Liquid Asset Fund (ISDLAF+), and the Illinois Energy Consortium (IEC).

## **GUIDELINES FOR MODERATORS:**

- Please remember that attendance should be for professional development and not for competing with other attendees or presenters.
- Please note that if a vendor is a presenter and uses the presentation as an arena to “sell” their product or services, the Moderator has the authority to stop the presentation if the presenter refuses to modify the content of their presentation. The Moderator will report such actions to the Deputy Executive Director of Illinois ASBO for follow-up.
- Due to a potential conflict of interest, no Moderator shall moderate a seminar given by an employee from their own company.
- Moderators are given the authority to ask any attendee to leave if they become combative with presenters.

## School District - Code of Ethics

### **BELIEF:**

The actions of a school business official, within the school system, the profession, the business community and the community itself, will at all times be based upon what is best for students, what is fair to all concerned and what is legally and morally right. In building goodwill and understanding, a school business official demonstrates respect for the past, knowledge of the present, concern for the future and loyalty to associates.

### **WE SHALL:**

- Preserve the integrity of the school business office in its dealing with others.
- Implement the school's policies and regulations, seeking ethically to reconcile them with sound educational goals.
- Uphold the integrity and the honor of the profession so as to gain confidence, respect and trust.
- Employ staff only on the basis of qualifications, honest credentials, open position, fair competition and in consideration of the policies and practices of your local school district.
- Perform to the best of one's ability through the duration of a contract or agreement.
- Use current technology in an appropriate and effective manner.
- Promote a reputation for honesty by complying with all local, state and federal laws.
- Transact all business without favor or prejudice and to deal justly and honorably with all.
- Share with other citizens the responsibility for the development of sound educational policy and assume the full responsibilities of citizenship.
- Provide adequate and accurate information regarding school business transactions to appropriate parties.
- Maximize educational value for the expenditure of tax dollars through the application of cost effective procedures.

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## Links and Resources

Professional Development Activity Proposal Form:

<http://iasbo.tools/submitaproposal>

Speaker Resource Page:

<http://iasbo.tools/speaker-resources>

Peer2Peer:

<http://iasbo.mymemberfuse.com/>

Illinois ASBO PDC Staff Contact:

(815) 753-9350



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