



# Committee Handbook

2011-2012

Revised September 2011

# 2011 - 2012 TASBO Board of Directors

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## **Introduction:** *THE trusted resource for school business and operations*

The Texas Association of School Business Officials (TASBO) is an independent, not-for-profit professional association dedicated to improving the knowledge and skills of its members and school business practices in Texas. TASBO is one of the state and province affiliates of the Association of School Business Officials International (ASBO) which serves members from the United States, Canada, and more than 20 other nations.

Established in 1946, TASBO began as a forum for exchanging ideas and sharing information about school business operations in Texas. In the early years, TASBO was operated by volunteers throughout the state, but as the Association's membership and needs grew, a center of operations was founded in Austin in 1986.

Currently, TASBO has more than 5,500 members and 30 regional affiliates, representing more than 900 school districts in Texas. Its annual operating budget for 2011-12 is slightly over \$4.1 million. For financial reporting purposes, TASBO is exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code.

The Association operates under the leadership of an executive director and the guidance of a nine-member Board of Directors and four Officers, all veteran school business administrators. There are 16 staff members employed at the Austin headquarters.

TASBO is organized on the volunteer committee principle. Research committees are a basic, fundamental force within the Association, continually investigating and planning toward better business management of schools and effective use of educational resources.

In addition to disseminating data and a wealth of ideas and information to its members, TASBO works closely with other professional, governmental, and business groups to initiate and assist with programs that enhance the knowledge and competence of school business executives. As a professional association, TASBO also develops and presents educational workshops and training sessions to ensure the highest standards of school business management practices, ethics, and professional growth.

# TASBO's Mission

**THE trusted resource for school business and operations.**

## Values Statement

The TASBO leadership and staff are guided in their duties by these principles:

- Supporting student needs,
- Focusing on members first,
- Maintaining ethics, integrity and accountability,
- Leading and managing with innovation and transparency; and
- Collaborating with education partners.

## Objectives

### **Customer Satisfaction and Service**

Provide benefits and services to the network of school business and operations officials.

### **Knowledge and Resource Center**

Deliver relevant content and resources to enhance professional growth and development.

### **Public and Professional Awareness**

Promote the value of school business and operations.

### **The Model Association**

Maintain a model association to serve the profession and membership.

# Professional Standards

Public education in Texas is a 40-billion dollar industry that is charged with the daunting responsibility of preparing youth for the complex world of tomorrow. The expectations of parents, communities, policy-makers, business leaders, and taxpayers are innumerable. The task of administering this vastly complex business of education requires professional leadership that is highly skilled, knowledgeable, and ethical. One of the most important members of the educational leadership team is the school business official. School business officials are expected to model moral, legal, and ethical behavior, and always make decisions and provide input to policy makers with the best interests of the students in mind.

To this end, TASBO set out a written code of ethics and standards of conduct in its Constitution when the Association was incorporated in 1985. These standards delineate both desirable goals and behavioral requirements considered essential for the protection of the public and for the optimal development of the profession. These rules are binding upon all members of the Association. Ethics oversight and enforcement is entrusted to TASBO's governing board operating with the assistance of the Association's legal counsel.

Additionally, to receive TASBO certification all applicants must complete the TASBO Business Ethics Course.

# **CODE OF ETHICS**

(Article 15-Bylaws)

A school business official in Texas is a professional educator dedicated to public service in the schools of this state. As a professional educator one's professional behavior must conform to a code of ethics. The code must be idealistic and practical as applied to members of our profession. School business officials acknowledge that the schools belong to the public and are created for the purpose of offering educational opportunity to all residents of this state. School business officials shall assume the responsibility of providing leadership and expertise as business officials to maintain exemplary standards of conduct both professionally and morally. It is understood that the business official's actions are observed and appraised by students, fellow professionals and members of the community.

Therefore, and to these ends, members of the Texas Association of School Business Officials subscribe to the following statements of standards.

## **THE TEXAS SCHOOL BUSINESS OFFICIAL:**

1. Makes the quality of education for students and the reasonable ability of taxpayers to pay the cost of education, the basic values in all decisions and actions.
2. Fulfills all professional responsibilities with honesty and integrity.
3. Obeys all local, state and federal laws which govern his activities and does not knowingly belong to any organization which advocates the overthrow of our form of democratic government.
4. Implements to the best of his ability the policies of the Board of Trustees and the administrative regulations of their superiors.
5. Avoids the use of his position for personal gain through influence politically, socially, or economically.
6. Maintains the highest degree of professional training possible through continuing educational programs and personal research.
7. Accepts academic degrees or professional certification only from accredited and legally constituted institutions.
8. Honors all contracts until fulfillment or legally released.

## **STANDARDS OF CONDUCT**

(Article 16-Bylaws)

Now, especially, in this age of accountability, when the activities and conduct of school business officials are subject to greater scrutiny and more severe criticism than ever before, Standards of Conduct are in order. The association cannot fully discharge its obligation of leadership and service to its members short of establishing appropriate standards of behavior.

In relationships within the school district it is expected that the School Business Official will:

1. Support the goals and objectives of the employing school system.
2. Interpret the policies and practices of the district to subordinates and the community fairly and objectively.
3. Implement, to the best of the official's ability, the policies and administrative regulations of the district.
4. Assist fellow administrators as appropriate in fulfilling their obligations.
5. Build the best possible image of the school district.
6. Refrain from publicly criticizing board members, administrators or other employees.
7. Help subordinates to achieve their maximum potential through fair and just treatment.

In the conduct of business and discharge of responsibilities, the School Business Official will:

1. Conduct business honestly, openly and with integrity.
2. Avoid conflict of interest situations by not conducting business with a company or firm which the official or any member of the official's family has a vested interest.
3. Avoid preferential treatment of one outside interest group, company or individual over another.
4. Uphold the dignity and decorum of the office in every way.
5. Avoid using the position for personal gain.
6. Never accept or offer illegal payment for services rendered.
7. Refrain from accepting gifts, free services or anything of value for or because of any act performed or withheld.
8. Permit the use of school property only for officially authorized activities.

In relationships with colleagues in other districts and professional associations, it is expected that the School Business Official will:

1. Support the actions of a colleague whenever possible, never publicly criticizing or censuring the official.
2. Offer assistance and/or guidance to a colleague when such help is requested or when the need is obvious.
3. Actively support appropriate professional associations aimed at improving school business management and encourage colleagues to do likewise.
4. Accept leadership roles and responsibilities when appropriate, but refrain from 'taking over' any association.
5. Refrain from using any organization or position of leadership in it for personal gain.

## Research Committee Mission

The mission of each TASBO Research Committee is to investigate its specialty area within the field of school business and operations management, report findings, make recommendations, and share new information with the membership in publications, at conferences, through training , and by other activities and means of communications. In relation to that mission, the priorities of TASBO Research Committees are:

- To develop and update education curriculum (see Intellectual Property agreement on page 10).
- To prepare educational programs and training sessions (workshops, conference roundtable discussion groups and clinic sessions, and education courses) in conjunction with TASBO staff.
- To conduct research in the committee’s identified specialty area of school business and operations management.
- To prepare and submit feature articles and other editorial materials for possible publication in the TASBO Report magazine or online publications.
- To assist in school district Management Reviews in order to promote better school business management practices and procedures.
- To assist with the nomination process of the Commitment to Excellence Award Program.
- To comply with all federal and state antitrust laws, rules and regulations in accordance with Board Policy 2541 Antitrust Avoidance (see page 11).

Texas Association of School Business Officials

Intellectual Property Agreement

BEGIN DATE: \_\_\_\_\_

PROJECTED COMPLETION DATE: \_\_\_\_\_

PROJECT: (describe fully) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The Texas Association of School Business Officials (TASBO) owns exclusively the copyright to all intellectual property created or modified or received at any time by any person associated with TASBO in connection with or in any way related to the person’s performance of services for TASBO, or while associated with TASBO in any way. This ownership includes the rights to publish and reproduce.

The term “intellectual property” includes all information, whether stored on paper or in any electronic or other medium including disks or tapes of any type, and includes but is not limited to, curriculum, supplemental course materials, files, memoranda, hardware, software, drawings, presentations, promotional materials, video or sound records, or other written, photographic, electronic, other tangible material containing information related to services of the type offered or provided by TASBO, whether created by TASBO or its agents or third parties.

All persons who associate with TASBO as employee or independent contractor, by their agreement to provide goods or services, agree and acknowledge that TASBO is the exclusive owner of TASBO’s intellectual property described above.

All persons who perform any service or provide any goods for TASBO involving the creation or modification or receipt of any of TASBO’s intellectual property, by such creation or modification or receipt of TASBO’s intellectual property, agree to return all of TASBO’s intellectual property immediately upon request.

My signature affirms that I have read the above information and agree to abide by the terms stated there.

\_\_\_\_\_  
Project Developer Signature

\_\_\_\_\_  
TASBO Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## TASBO Antitrust Policy

### Article II: PUBLIC/EXTERNAL RELATIONSHIPS

#### Section 2500: RELATIONS WITH AGENCIES AND ORGANIZATIONS

##### Antitrust Avoidance - 2541

It shall be the policy of the association to be in strict compliance with all federal and state antitrust laws, rules and regulations. Therefore:

1. These policies apply to all membership, board, committee and other meetings sponsored by the association, and to all meetings attended by representatives of the association.
2. Discussions of prices or price levels are prohibited. In addition, no discussion is permitted of any elements of a company's operations, which might influence price such as:
  - a. Cost of operations, supplies, labor or services;
  - b. Allowance for discounts;
  - c. Terms of sale including credit arrangements; and,
  - d. Profit margins and mark ups, provided this limitation shall not extend to discussion of methods of operation, maintenance, and similar matters in which cost or efficiency is merely incidental.
3. It is a violation of antitrust laws to agree not to compete, therefore, discussions of division of territories or customers or limitations on the nature of business carried on or products sold are not permitted.
4. Boycotts in any form are unlawful. Discussion relating to boycotts is prohibited, including discussions about blacklisting or unfavorable reports about particular companies including their financial situation.
5. In all meetings attended by representatives of the association where discussion can border on an area of antitrust sensitivity, that the association's representative request that the discussion be stopped and ask that the request be made a part of the minutes of the meeting being attended. If others continue such discussion, the association's representative should excuse himself from the meeting and request that the minutes show that he left the meeting at that point and why. Any such instances should be reported immediately to the President and staff of the association.

A copy of these Antitrust Compliance Policies shall be given to each officer, director, committee chair, affiliate leader and association employees annually and shall be reviewed at least once each year with the Board of Directors during a Board meeting, be included in the Committee and Affiliate Handbooks, and reviewed with employees at a staff meeting at least once each year.

(Established August 2, 2004)

##### TASBO Operating Procedures to Support Policy 2541

Care must be taken to ensure that exhibitor arrangements are handled in a way that will not violate antitrust laws and TASBO Policy #2541. It is an antitrust violation to prohibit competition. This means that no action should be taken to limit competition among exhibitors. There can be no requirement that the exhibitor be a member of the Association and no exhibitor may be excluded for reasons that could be construed as a limitation on competition.

## Committees

Committees are a basic, fundamental force within the Association. In fact, from top to bottom, TASBO is organized on the volunteer committee principle. By definition, a committee is “a body of persons elected or appointed to attend to any matter of business referred to it, often a section of a larger body.” A volunteer is “a person who enters into any service of his own free will; a person who of his own free will offers services without the stipulation of being compensated financially or otherwise.”

TASBO’s committees are organized on the pyramid structure. At the top of the pyramid is the Board of Directors, a committee of volunteers elected by the membership. The Board of Directors is the Association’s governing board and has authority to execute its duties of meeting the objectives of the Association, of managing its finances and properties and of establishing necessary policies and procedures as needs arise.

TASBO Policy contains the provision under which the Board of Directors has the authority to establish various committees in accordance with established policies. Section 8500 specifically addresses the Association’s research committees and reads as follows:

“Research Committees. All officers and committee members of a TASBO Committee must be a member in good standing of the state organization... The Association recognizes the importance of research dedicated to excellence in school business management and therefore establishes a network of professional research committees for the purpose of constant and continual research and planning toward better business management of our schools.”

The Association has identified specialty areas in school business management and has established a Research Committee in each of the following:

- Accounting & Finance
- Distribution & Inventory
- Information Technology
- Internal Audit
- Maintenance & Operations
- Payroll
- PEIMS
- Personnel
- Purchasing & Supply Management
- Risk Management
- Safety & Security
- School Nutrition
- Textbooks
- Transportation

TASBO has two Standing Committees: Governmental Relations & Professional Certification. Members are appointed by the TASBO Board President with approval by the Board.

By design, each research committee chair (or designee) will serve as an advisory liaison to the Professional Certification Committee and each affiliate president (or designee) will serve as an advisory liaison to the Governmental Relations Committee.

The Association's research program and its related activities continue to grow. All members are strongly encouraged to participate and share their expertise with their colleagues. Select a committee to serve on by indicating your choice on the Application for Research Committee Membership at [www.tasbo.org](http://www.tasbo.org) or during the renewal process. Your choice should be based on interest, experience, or expertise in the committee's identified specialty area. The application for Research Committee Membership form should be returned to TASBO's Director of Professional Development.

## **Committee Structure**

The Association emphasizes a leadership organizational structure for each Research Committee. This structure calls for experienced members to provide leadership in a specific area of school business or operations management by serving as Chair and Vice Chair.

Leadership by example is the key to the success of each Research Committee, just as leadership is the key to the success of the Association's entire research program. Well-informed, willing workers are the core of each committee.

Committee members, individually or collectively, are encouraged to recommend changes in existing programs as well as recommend new programs to the Board of Directors through their Board Liaison and/or through the TASBO professional staff. The Board of Directors has the authority and responsibility to screen, analyze and make a final determination on these recommendations.

## **Meeting Responsibilities**

Committees normally meet two times a year: at the Annual Conference and at TASBO headquarters in early fall. In addition, committee chairs and vice chairs are encouraged to attend the annual Leadership Academy held in April. The committee chair may call a special committee meeting at other times during the year if necessary.

## **Role of Research Committee Officers**

The chair and vice chairs are the navigators of a Research Committee. If they do not have a clear idea of where they want the committee to go, and if they are not committed to reaching that goal, the committee will accomplish little. Committee chairpersons and vice chairs shall be appointed or elected at the meeting of the committee during the Annual Conference each year. TASBO Policy requires that all officers and committee members of a TASBO Committee be members in good standing of the state organization. The term for the chairperson and vice chairs shall run from Annual Conference to Annual Conference. A chairperson or vice chair can serve for more than one year if the committee chooses to have a longer term period.

### ***Chair***

Ownership of the Association's mission and goals by all committee chairs is essential to TASBO's future success. Continuous and clear communications with the committee's Board Liaison and TASBO staff

will enable the chair to align committee goals and objectives with those of the Association.

Once the major goals are set, the responsibilities of the chair include:

- Planning the meetings and the methods by which the objectives of the committee will be accomplished.
- Serving as an advisory liaison to the Standing Committee for Certification, but not as a member. This duty may be delegated to another committee member.
- Reporting to the TASBO staff and Board Liaison regarding the committee's progress.
- Evaluating committee efforts and encouraging members to actively participate.

### ***Vice Chair***

The Vice Chair assumes primary responsibility for the committee's educational programming activities and other duties as assigned by the committee chair.

### ***Secretary***

The secretary maintains committee records and information, including minutes and reports of committee business.

## **Committee Members**

Joining a TASBO Research Committee is a serious commitment. While committee leaders recognize that members are volunteers with full-time jobs, they do expect the following:

- Promptly acknowledge all communications concerning committee work and availability for meetings.
- Accept and follow through on assignments, respecting deadlines and parameters of assignments.
- Thoroughly review agenda and background material prior to meetings.
- Take an active part in discussions during meetings, share relevant information, respect other ideas or viewpoints, and stay on the subject under discussion.

## **Length of Terms**

Committee members make the decision regarding the length of the term for the leadership positions. Some committees elect officers with the understanding that they will serve two-year terms.

## **Qualifications**

Service on a Research Committee is open to any paid Active, Life, Retired, Student or Associate member of TASBO with experience and/or interest in that committee's area of specialty. (Associate members may not hold Research Committee leadership positions.) The member must express a willingness to accept committee assignments and participate in committee activities, programs, and projects. The level of effectiveness and success of each Research Committee is directly related to the amount of time and energy expended by committee members on activities and projects. An important factor in the success of any individual serving on a Research Committee is support from his or her employer.

Research Committee members work under the direction of the committee's chair and vice chairs. To ensure active participation and an adequate level of activity, TASBO reserves the right to remove a com-

mittee member from a specific assignment if that member is uncooperative with the committee leaders and other committee members; does not accept committee responsibilities; fails to meet committee commitments; or abuses the position in a manner detrimental to the Association.

### **Format for Committee's Annual Report of Activities**

After the annual conference, the committee chair should complete a detailed report and give copies of the report to the appropriate board liaison and TASBO's Director of Professional Development. The information and suggestions will be beneficial in making plans for the coming year. The following information should be included in the annual report:

- Committee name
- Time period covered by this report
- List of committee leaders
- Main objectives the committee had this year
- List accomplishments for the year
- List activities in progress and those planned for next year
- Recommendations to the Board of Directors
- Recommendations to the TASBO staff
- Name of person submitting the report
- Update on curriculum project

### **TASBO's Commitment to Excellence Award**

One of the important tasks assigned to committees at their fall meetings is the nomination of a fellow TASBO member for the Commitment to Excellence Award. This award is the highest honor bestowed on TASBO members by their peers. Committee members will be asked to acknowledge that their nominee has met all the requirements to be nominated for this prestigious award as outlined in the TASBO award rules and further acknowledge that the committee membership in general had the opportunity to participate in the nomination process. The requirements are:

- Nominee is a current active or life TASBO member
- Nominee has been an active TASBO member for at least 10 of the last 15 years
- Nominee holds a current TASBO certification and has met all continuing education requirements.
- Nominee has not served on the TASBO Board of Directors for one year prior to the nomination date
- Nominee has not been nominated for this award for the two preceding years
- Nominee has not won this award previously
- Nominee is not running for a position on the TASBO Board

### **TASBO Leadership Academy**

The Leadership Academy is a mutually-beneficial, annual gathering that brings together the elected leaders of affiliates, past presidents of TASBO, research committee leaders, the Board of Directors, and

key TASBO staff. The purpose of the Annual Leadership Academy is to provide leadership training and enhance communications between TASBO, its affiliated associations, and its committees. The Academy provides a forum for exchanging ideas and suggestions, discussing common concerns, networking with professional colleagues, and setting priorities.

***Who Should Participate?***

All TASBO members are welcome to attend; however, the event is designed for the Leadership of TASBO which includes:

- |                                   |  |
|-----------------------------------|--|
| Members of the Board of Directors | Past Presidents of the TASBO Board             |
| Affiliate Presidents              | Designated staff members                       |
| Committee Chairs                  | Others as designated by the Executive Director |

Spouses are welcome to participate in social activities.

***Who Prepares the Program?***

TASBO provides the program and speakers. The topics on the program and the speakers change from year to year, based on the needs of the membership in addition to suggestions and recommendations from affiliate and committee leaders.

***Who Pays the Cost for Participation?***

There is no registration fee for invited guests to attend the Leadership Academy. As a token of appreciation for the time and commitment affiliate presidents, committee chairs and others have made, TASBO will provide meals and pay for the cost of one night's lodging at the contracted hotel. TASBO does not pay for travel expenses. If an affiliate president or committee chair is unable to attend, he or she may designate an alternate to attend.

## **Leadership Structure for Specific Committees**

Committees establish their own leadership structure with regard to rotation of the leadership. This information reflects committee operations as of August 2011.

### ***Accounting & Finance Committee***

- Chair
- Board Liaison
- Vice Chair (moves up to become Chair)
- Vice Chair for Curriculum (does not rotate to another leadership position)
- Past Chair

All officers serve two-year terms ending in odd-numbered years.

### ***Distribution and Inventory Committee***

- Chair
- Board Liaison
- Vice Chair
- Vice Chair for Curriculum

2 year terms - Vice Chair moves up to become Chair

### ***Information Technology Committee***

- Chair
- Board Liaison
- Co-Chair
- Secretary

Officers serve two-year terms ending in odd-numbered years. Automatic rotation of Co-Chair to Chair

### ***Internal Audit Committee***

- Chair
- Vice Chair
- Board Liaison + Secretary

2 year terms - Vice Chair moves up to Chair after 2 years

### ***Maintenance and Operations Committee***

- Chair
- Board Liaison
- First Vice Chair (moves up to become Chair)
- Secretary (moves up to become First Vice Chair)
- Immediate Past Chair

### ***Payroll Committee***

- Chair
- Board Liaison
- Vice Chair (moves up to become Chair)
- Secretary (moves up to become Vice Chair)

Officers serve two-year terms ending in odd-numbered years.

***PEIMS Committee***

- Chair
- Board Liaison
- Vice Chair for Workshops
- Vice Chair for Education Courses
- Secretary

Officers serve two-year terms ending in even-numbered years.

***Personnel Committee***

- Chair
- Board Liaison
- Vice Chair for Programs

Officers serve 2 year terms, no automatic rotation of leadership.

***Purchasing & Supply Management Committee***

- Chair
- Board Liaison
- Vice Chair for Programs
- Secretary

(no automatic rotation of leadership)

***Risk Management Committee***

- Chair (moves to certification liaison)
- Board Liaison
- Vice Chair for Programs (moves up to chair)
- Certification Liaison

Officers serve two-year terms ending in even-numbered years.

***Safe Schools Committee***

- Chair
- Board Liaison

***School Nutrition Committee***

- Chair
- Board Liaison
- Vice Chair (moves up to become Chair)
- Secretary (moves up to become Vice Chair)

Officers serve two-year terms ending in even-numbered years.

***Textbooks Committee***

- Chair
- Board Liaison

Chair serves 2-year terms ending in even-numbered years.

***Transportation Committee***

- Chair
- Board Liaison
- Vice Chair

(no automatic rotation of leadership)

## Board Member Liaison Committee Assignments

Each Research Committee shall have a member of the TASBO Board of Directors to serve as its primary liaison. This Board member can provide valuable help and support for committee activities and planning. The role of the Board Liaison is to:

- Ensure the Research Committee receives timely notification of Board policies or decisions that might affect the committee’s activities.
- Serve as a conduit for information about relevant Research Committee activities to the Board of Directors and serve as advocate for the committee on the Board.
- Work with the committee’s leadership to coordinate the Association’s goals and objectives and the committee’s activities and plans.
- Review policies and procedures established by the Board of Directors that govern Research Committee activities and serve as a resource when questions arise.

### Research Committees

Accounting & Finance .....	James Terry
Distribution & Inventory.....	Alan King
Information Technology.....	Alan King
Internal Audit .....	Michael Ball
Maintenance & Operations. ....	Mark Tarpley
Payroll.....	Karen Wiesman
PEIMS .....	Karen Smith
Personnel.....	Staci Robertson
Purchasing & Supply Management .....	Lindy Finley
Risk Management .....	Kelly Penny
Safety & Security.....	James Terry
School Nutrition.....	Karen Wiesman
Textbooks.....	Kelly Penny
Transportation.....	Deborah Ottmers

### Standing Committees

Governmental Relations.....	Becky Estrada & David Garcia
Professional Certification.....	Frankie Jackson & Deborah Ottmers

## Role of Professional Staff

The professional staff at the TASBO office can help Research Committees reach their goals. The role of the staff is to:

- Maintain contact with Research Committee leadership throughout the year.
- Serve as a resource at the headquarters office for Research Committees.
- Work with committees to offer training in each area of specialty and designate instructors.
- Disseminate information on conference timelines.
- Distribute editorial calendar for TASBO Report.
- Promote Research Committee membership and develop promotional campaigns to attract new members.

**TASBO Staff** - When you need additional information, phone (512) 462-1711 or email:

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# Content & Communications

TASBO is committed to featuring content reviewed and created by its research committees. Utilizing both online and print resources, TASBO provides a forum to its members and the research committees are encouraged to play a role in the process.

## Annual Conference

TASBO's Communications Department is charged with the responsibility of printing materials for the Annual Conference. To allow adequate time to plan, design, produce, and distribute the materials, production schedules are closely followed.

In August, the "Call for Presentation" online submission was distributed to members and linked on the TASBO website. Committee members should help identify new topics of interest to the general membership; however, the basic topics should not be overlooked.

Committee chairs will be given a general schedule for the Annual Conference. Working within the given time slots and dates, committees may make recommendations for specific presentations. These requests will be followed on a first-come, first-serve basis. It would be helpful to send first, second, and third choices of time slots and days. The Director of Professional Development will work with you as closely as possible to meet your requests for programming.

During the Annual Conference, research committee members should participate and monitor the content of the programs. Feedback on programs and/or programming problems encountered during the Conference should be brought to the attention of the TASBO staff.

## ***TASBO Report Magazine***

The TASBO Report is published on a quarterly basis to keep school business and operations professionals informed. It offers practical solutions to workplace problems, discusses new approaches and innovative best practices in all areas of school business management, and prompts readers to consider new models or ways of thinking. Typically, the articles emphasize actual experiences - some successful and some not. Each committee chair is invited to join the TASBO Editorial Committee in myTASBO.

TASBO relies on the contribution of articles from members and other experts in the school business field. We seek articles written in journalistic rather than academic style - short paragraphs and clear, concise, jargon-free language. Research committees play an important role in identifying topics that would be of interest to readers, and in locating qualified authors to write articles. Publication of an original article in the TASBO Report earns 3 hours of continuing education credits.

## Article Development

When a research committee begins work on developing articles for the TASBO Report, there are a few activities that will help ensure success:

**Before you write or submit an article**, email a short inquiry consisting of a brief summary of the proposed article to [tgreer@tasbo.org](mailto:tgreer@tasbo.org).

**Review previous issues** — Look through past issues of the TASBO Report that dealt with your critical issue area. Identify topics that have not been covered, avoid topics that have been frequently covered, and try to find authors who have not recently appeared in the TASBO Report.

**Start early** — Give yourself and your committee members plenty of lead time to complete their assignments. A good way to calculate enough lead time is to work backwards from the publication date. Ample lead time is needed to ensure that Communications Department staff are able to meet their deadlines. Also, take into account that committee members are volunteers and may need extra time to locate authors or actually write the articles themselves.

**Put it in writing** — When someone agrees to write an article, follow-up the conversation with a letter thanking them for agreeing to write and reiterating the subject matter and the due date. Send an email to the Director of Communications to confirm a publication date.

## Writer's Guidelines for TASBO Report

The newsletter published by the Texas Association of School Business Officials has been rated by members as their top source for school business news and information. Articles for the newsletter cover all phases of school business.

Features generally fall into three categories:

- Practical discussion of problems encountered by many school business officials and ideas and guidelines for resolving them;
- Articles that address concerns facing the profession in general; and
- Technical or “how to” articles, covering new standards of practice in school business.

The most common reasons why articles are not accepted for publication in the TASBO Report are that they:

- deal with topics that are elementary or are irrelevant to school business management;
- are poorly organized;
- lack insight;
- describe an idea whose narrow scope and depth do not warrant feature article treatment;
- offer too few examples; or
- are biased, self-promotional, or market a product or service available from only select vendors.

The typical newsletter article is 500 to 1,000 words, although length is flexible depending on the subject.

Remember these tips when preparing an article:

**Format** — All articles should be submitted in Microsoft Word or another IBM-compatible word processing format. Charts and illustrations should be included at the end of the article or in a separate file. We prefer that you submit the article as an attachment to an email sent to: [tgreer@tasbo.org](mailto:tgreer@tasbo.org). Please do not send material by facsimile.

**Photos** — Notify the Communications Department if photos are available or if a photo opportunity exists. If you submit photographs, write captions for them and place the captions at the end of your article. Photos should be at least 300 dpi or higher.

**Title** — Create a working title. Your working title helps focus your ideas. Make it brief, three to six words, use an active verb, and aim to be clever.

**Byline** — Provide the author(s) full name, title, company/organization, address, and phone number.

**Accuracy** — Double-check the accuracy of your article and verify names, dates, facts, and figures. Accuracy is your responsibility, not that of the TASBO Report editor.

## Evaluation and Acceptance

All queries and articles submitted to TASBO are acknowledged with an email and reviewed by the editorial board and/or other reviewers. Articles are evaluated based on originality of topic, readability, soundness of content, timeliness, and interest to our readers. We also consider whether you support your ideas with concrete examples. We are not looking for scholarly term papers or dissertation reports. We do not use footnotes or end notes. Articles that essentially only promote a particular company, product, or service are not considered publishable.

We may accept your article outright, accept it for a staff rewrite, or accept it contingent on your revision. It is not unusual for us to work with an author through several revisions until we believe the article is in publishable form. All accepted articles are subject to editing for style, clarity, sexist language, and length. TASBO follows the Associated Press Style Guide for general editing.

The TASBO Editorial Committee in myTASBO serves in an advisory role to review some manuscripts and provide guidance on the editorial calendar.

## The Editing Process

Upon acceptance for publication, we tentatively assign your article to an issue. Because each issue's make-up is dependent on a number of factors, including advertising levels for the issue, the scheduling of an article to an issue is subject to change.

Your writing style is your own, and we make every attempt to preserve it as we prepare your article for publication, but we will try to make the copy as substantive, clear, and lively as possible. If your article is substantially revised, we will send you the edited version, and you will have about three days to review it. If questions arise after that, we'll call you; but otherwise, the next time you see your article will be when it's in print.

## Reaping the rewards

Most authors feel great personal satisfaction from having an article published in the TASBO Report and helping school business officials across the state do a better job. Remember, publication of an original

article in the TASBO Report earns 3 hours of continuing education credit.

Reviews of school business books, letters to the editor, and information on career moves, promotions and achievements are always welcome. Address articles and inquiries to Tom Greer, Director of Communications, TASBO, 2538 South Congress Avenue, Austin, TX 78704, or via email to [tgreer@tasbo.org](mailto:tgreer@tasbo.org).

### **TASBO Update e-newsletter**

Every two weeks, TASBO submits an e-newsletter to members. It contains upcoming training events, business news and general information about TASBO. Committees can use this to announce news meant to reach all TASBO members.

### **myTASBO**

myTASBO is the new online community, which has incorporated aspects of past TASBO online tools, such as e-communities and Best Practices database. Additionally, TASBO has created Groups or “microsites” for each committee. This enables groups to collaborate and network online within TASBO’s member-based platform.

### **myTASBO Groups**

Each committee has a Group page, moderated by TASBO and a designated committee representative, where members can post announcements, start discussions, post resource documents and recruit members.

### **myTASBO Resources**

The Best Practices Database has migrated to myTASBO’s Resource Library (Resources). TASBO and the committee chairs (or designated representative) are tasked with monitoring the resource items submitted by TASBO members that are pending approval. Committees are also encouraged to periodically evaluate the resources in their area and submit new ones. Each TASBO member is given an option to rate resources.



# **Leadership/Membership Qualifications & Responsibilities**

## **JOB TITLE: Officers of the Professional Certification Committee**

**DATE: Adopted July 2009**

### **PRIMARY PURPOSE:**

The Committee shall serve as the advisory group to the TASBO Board of Directors regarding all matters related to the TASBO Certification Program.

### **QUALIFICATIONS:**

Members of the Committee must have earned TASBO certification or have previous experience as a member of the TASBO Board of Directors, with 3 years as an active or life member and 2 years active service on a research committee. All officers, committee members, and alternates must be Active or Life members in good standing of the state organization. All members and alternates will be required to sign a Standing Committee Code of Conduct.

### **COMMITTEE LEADERSHIP:**

- Committee Chair (to be appointed by the Board of Directors) shall be responsible for:
  - Working with TASBO staff to plan the meetings and the methods by which the objectives of the committee will be accomplished.
  - Exercising aggressive leadership by stimulating thinking, conducting discussions and keeping the meeting on track.
  - Maintaining records and information including meeting minutes and reports to the Board regarding the committee's progress.
  - Bringing new ideas to the committee to promote its goals and maintain its leadership role in TASBO
- Communicating with the membership to promote attendance at regular meetings as well as encouraging new ideas and member involvement
- Vice Committee Chair (elected by the committee members at the annual conference or appointed by the Board of Directors) shall be responsible for:
  - Working with the TASBO Headquarters staff on developing and maintaining a list of available and qualified instructors to teach the TASBO Management curriculum required for certification.
  - Working with sub-committees as required to help develop TASBO Certification curriculum requirements and content.
  - Assuming the duties of Chair in his or her absence.
- Secretary (elected by the committee members at the annual conference or appointed by the Board of Directors) shall be responsible for:
  - Recording and keep accurate records of all TASBO Certification Committee Meetings and events.
  - Reporting same to the Chair, Vice Chair and TASBO Staff for review and correction as needed prior to submission.
  - Assisting Certification Committee Chair and Vice Chair with maintaining accurate records of all TASBO Certification Committee Meetings and events.

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities, duties, and skills that the Association may expect of its standing committee members.

**JOB TITLE: Professional Certification Committee Members**

**DATE: Adopted July 2009**

**PRIMARY PURPOSE:**

The Committee shall serve as the advisory group to the TASBO Board of Directors regarding all matters related to the TASBO Certification Program.

**QUALIFICATIONS:**

Members of the Committee must have earned TASBO certification or have previous experience as a member of the TASBO Board of Directors, with 3 years as an active or life member and 2 years active service on a research committee. All officers, committee members, and alternates must be Active or Life members in good standing of the state organization. All members and alternates will be required to sign a Standing Committee Code of Conduct.

**MAJOR RESPONSIBILITIES AND DUTIES:**

- Develop and maintain a strong, flexible and meaningful certification program for the TASBO membership.
- Prepare and conduct in-service training and education for the TASBO membership about the TASBO Certification Program.
- Conduct research sponsored by the TASBO Board and Executive Director in the area of Certification Programs
- Prepare and submit for possible publication, feature articles and other editorial material about certification for TASBO publications.
- Identify the needs and provide curriculum and training for TASBO Management courses.
- Maintain Certification Program rules, regulations and procedures that will promote and maintain valid TASBO Certification throughout the TASBO organization and the State of Texas.
- Gather pertinent research data from the field and disseminate it to the TASBO membership and develop instruments to be used as models for analyzing and improving school district business practices through certification of its members.

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities, duties, and skills that the Association may expect of its standing committee members.

**JOB TITLE: Governmental Relations Committee Chair**

**DATE: Adopted July 2009**

**PRIMARY PURPOSE:**

The Chair will guide the committee members in their role as an advisory group to the TASBO Board of Directors as the Board develops recommendations and undertakes tasks related to governmental relations, including but not limited to communication with legislative bodies, the Texas Education Agency, the Teacher Retirement System, the State Board of Education Certification, the State Board of Education.

**QUALIFICATIONS:**

Qualifications: Members of the Committee must have 3 years as an active or life member and 2 years active service on a research committee or service as an officer of an affiliate. All officers, committee members, and alternates must be Active or Life members in good standing of the state organization. All members and alternates will be required to sign a Standing Committee Code of Conduct.

**MAJOR RESPONSIBILITIES AND DUTIES:**

The Committee Chair is expected to:

- chair committee meetings,
- review committee minutes,
- maintain ongoing communications with committee members, and TASBO staff, and
- provide reports to TASBO regarding committee activities.

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities, duties, and skills that the Association may expect of its committee leaders.

**JOB TITLE: Governmental Relations Committee Members**

**DATE: Adopted July 2009**

**PRIMARY PURPOSE:**

The Committee shall serve as the advisory group to the TASBO Board of Directors as they develop recommendations and undertake tasks related to governmental relations, including but not limited to communication with legislative bodies, the Texas Education Agency, the Teacher Retirement System, the State Board of Education Certification, the State Board of Education. Members will be expected to monitor Legislative and Agency activities and provide input to these groups when appropriate.

**QUALIFICATIONS:**

Members of the Committee must have 3 years as an active or life member and 2 years active service on a research committee or service as an officer of an affiliate. All officers, committee members, and alternates must be Active or Life members in good standing of the state organization. All members and alternates will be required to sign a Standing Committee Code of Conduct.

**MAJOR RESPONSIBILITIES AND DUTIES:**

Members will be expected to:

- monitor Legislative and Agency activities,
- provide recommendations to the Board of Directors,
- communicate with TASBO members regarding important issues,
- develop information sessions for members regarding legislative or agency activities, and
- provide testimony in person or in writing to legislators and/or other state and federal leaders when appropriate.

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities, duties, and skills that the Association may expect of its committee members.

**JOB TITLE: Research Committee Chair**

**DATE: Adopted July 2009**

**PRIMARY PURPOSE:**

The role of the Committee Chair is to guide committee work in researching, analyzing and publicizing improved methods of school business management in specific specialty areas represented by the TASBO membership.

**QUALIFICATIONS:**

- Must be an active member of TASBO (associate members not eligible)
- Must follow the TASBO Code of Ethics and Standards of Conduct

**MAJOR RESPONSIBILITIES AND DUTIES:**

The Committee Chair is expected to chair committee meetings, review committee minutes, maintain ongoing communications with committee members and TASBO staff, and provide reports to TASBO regarding committee activities.

The Committee Chair will be expected to guide committee members as they:

- develop and update certification curriculum
- prepare educational programs and training sessions (workshops, conference roundtable discussion groups and clinic sessions, and education courses) in conjunction with TASBO staff.
- conduct research in the committee's identified specialty area of school business and operations management.
- prepare and submit feature articles and other editorial materials for possible publication in the TASBO Online Report or quarterly magazine.
- assist in school district Management Reviews in order to promote better school business management practices and procedures.
- assist with the nomination process of the Commitment to Excellence Award Program.
- comply with all federal and state antitrust laws, rules and regulations in accordance with Board Policy 2541-Antitrust Avoidance.

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities, duties, and skills that the Association may expect of its committee leaders.

**JOB TITLE: Research Committee Members**

**DATE: Adopted July 2009**

**PRIMARY PURPOSE:**

Committee members participate in researching, analyzing and publicizing improved methods of school business management in specific specialty areas represented by the TASBO membership.

**QUALIFICATIONS:**

- Must be a member of TASBO
- Must follow the TASBO Code of Ethics and Standards of Conduct

**MAJOR RESPONSIBILITIES AND DUTIES:**

- Develop and update certification curriculum
- Prepare educational programs and training sessions (workshops, conference roundtable discussion groups and clinic sessions, and education courses) in conjunction with TASBO staff.
- Conduct research in the committee's identified specialty area of school business and operations management.
- Prepare and submit feature articles and other editorial materials for possible publication in the TASBO Online Report or quarterly magazine.
- Assist in school district Management Reviews in order to promote better school business management practices and procedures.
- Assist with the nomination process of the Commitment to Excellence Award Program.
- Comply with all federal and state antitrust laws, rules and regulations in accordance with Board Policy 2541-Antitrust Avoidance.

The foregoing statements describe the general purpose and responsibilities assigned to this job and are not an exhaustive list of all responsibilities, duties, and skills that the Association may expect of its committee members.

# Join a Research Committee...*help shape the future of school business*

TASBO Research Committees help chart the course to excellence in school business and operations management by:

- \*Offering opportunities for networking with other business professionals in your specialty area.
- \*Dedicating time to researching, analyzing, and publicizing improved school management practices.
- \*Specializing in programs designed to focus on important education issues and trends in your area of practice.
- \*Helping advance your school business career through a variety of professional development resources.

I would like to serve on the following Research Committee:

- |   |   |
|---|---|
| <input type="checkbox"/> Accounting & Finance     | <input type="checkbox"/> Personnel                      |
| <input type="checkbox"/> Distribution & Inventory | <input type="checkbox"/> Purchasing & Supply Management |
| <input type="checkbox"/> Information Technology   | <input type="checkbox"/> Risk Management                |
| <input type="checkbox"/> Internal Audit           | <input type="checkbox"/> Safety & Security              |
| <input type="checkbox"/> Maintenance & Operations | <input type="checkbox"/> School Nutrition               |
| <input type="checkbox"/> Payroll                  | <input type="checkbox"/> Textbooks                      |
| <input type="checkbox"/> PEIMS                    | <input type="checkbox"/> Transportation                 |

Name \_\_\_\_\_  
Title \_\_\_\_\_ District/Firm \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-Mail \_\_\_\_\_

*I am willing to cooperate with the Research Committee Chair to accomplish the committee's objectives. I can be a productive committee member whether or not I can attend the Annual Conference by participating in programs, certification, and publications. I pledge that if I am appointed to a committee, I will make every effort to attend its meetings and be an active member.*

Signature \_\_\_\_\_

Please mail this form to TASBO at 2538 South Congress Avenue, Austin, TX 78704, email to [bbunte@tasbo.org](mailto:bbunte@tasbo.org), or fax to (512) 462-1782. You will be notified of your appointment. If you have not received confirmation within 30 days after applying, please contact Becky Bunte, Director of Professional Development at (512) 462-1711 ext 239.

Research Committee Handbook  
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