

Theme Results from the Fall 2015 Membership Surveys
Prepared by WASBO Member Resources and Professional Improvement Committees,
March, 2016

After reviewing membership survey results, the committees identified the following broad topics. Each committee member then voted for his or her top three topic areas. The prioritized recommendations were presented to the Board of Directors to assist in developing SMART Goals as part of the WASBO strategic planning process.

Theme 1: Assess WASBO's offerings to those new to school business to determine how we can more effectively support this large component of WASBO membership.

65% of WASBO membership has been a member less than 9 years. Over ¼ of membership has worked in School Operations for 5 or fewer years. Survey results seem to indicate individuals are becoming WASBO members after they have been in the workforce for a while, and that many are taking jobs in School Operations as a second career. WASBO should determine how well we are preparing and supporting people new to the field. A comprehensive review of WASBO offerings would include the WASBO Mentorship program, Year of Success, PDP training, and beyond. WASBO has a diverse membership made up of both state licensed practitioners and well as other positions not needing an O8 but requiring substantial expertise in their chosen field. This theme would work to ensure WASBO is meeting the needs of all of its membership base.

Theme 2: Broadly review all certifications currently offered or under consideration to determine the appropriate level of resources WASBO wants to commit to each.

WASBO currently offers:

- the Facilities Manager Core Certification and Continuing Education Program (with curriculum designed by the WASBO Facilities Committee),
- the Certified School Risk Managers (CSRM) designation (with curriculum provided by the National Alliance for Insurance Education and Research),
- and a study group for those seeking to earn the Certified Administrator of School Finance & Operations (SFO) with curriculum provided by ASBO International.

In addition, WASBO has formed task forces to examine the potential for HR and Payroll certifications. A review of member surveys indicated interest in CSRM; however, concern has been expressed in the declining interest of those wishing to maintain certifications on an ongoing basis, particularly for the SFO and in part for the CSRM designation. Interest in HR and payroll certification is mixed, and it is surmised this is in part based on district size and needs. In addition, other organizations provide similar programming that might compete with a potential WASBO HR or payroll certification. There may also be a need for assistance in tracking for professional development.

WASBO should broadly review all certifications, determining how much demand there is, the degree to which curriculum would need to be developed versus adopted from outside sources,

whether there are better ways to support individuals in specific roles without offering our own certification, and how certifications are integrated into general professional development.

Theme 3: Review current WASBO membership options

WASBO membership encompasses a broad array of individuals with many different job responsibilities. As membership is currently structured, there are some business office positions for which it would be difficult to justify an individual membership (i.e. payroll specialist), but for whom some contact with WASBO might be beneficial. If WASBO should proceed with the HR and/or Payroll certifications, we would also need to address whether membership is required in order to participate in those certifications (as it is currently required to participate in the Facilities Manager Certification, for example.)

Several active Service Affiliates have asked over the years if a corporate membership option could be made available so that additional staff from their organizations could participate in membership without incurring the full cost of an individual membership. Some school districts might also find this membership structure appealing. A significant factor related to group membership would need to be the administrative capabilities of WASBO back office systems to manage such a structure. A comprehensive review of membership options might include varying levels of membership dues and benefits, which could better match what members need and can receive from the organization. A custodian or bookkeeper aspiring to a position of greater responsibility might therefore have a different membership rate than someone currently in the Facilities Director or 08 Business Manager's role.

Theme 4: Comprehensively review how and when WASBO delivers content.

WASBO offers content through many different vehicles, from the *Taking Care of Business* newsletter to the WASBO website, and from in person conferences to online forums. A comprehensive review of how and when WASBO delivers content might include:

- How to better provide written content in the timeliest and most customizable way. For example, would shortening the newsletter and increasing frequency be beneficial? Would it be best to move to an online-only version and if that was done, what impact might it have on advertising revenues? Could one subscribe to topic areas of specific interest and receive only content in those areas?
- Is there content we aren't currently providing that would help WASBO members better understand what membership includes so they can take fuller advantage?
- Should WASBO provide professional development offerings that are not exclusively in person? Is there content that could be as effectively delivered via webinar, especially for those who have difficulty getting out of district for professional development? Or for those conferences which sell out with regularity?
- Is the WASBO website underutilized given that it is primarily used for conference and dues related transactions? What other offerings would need to be added to make it a more compelling destination? Or is it more a question of informing members of the resources already there?

Theme 5: Assess methods and strategies to encourage participation and engagement in WASBO regionals.

WASBO Regionals have subsisted largely on their own. This theme calls for WASBO to review, with input from Regionals, how the state organization might better support District Professionals throughout the state by encouraging more local participation. Regionals have reported struggling to identify topics to discuss on the local level. In addition, in many regionals the focus is on the business office, and facilities directors and staff may not have local opportunities for collaboration (Though there are clearly some strong regional facilities groups.) Some regional participants are not actually WASBO members, and many WASBO members may not be aware of regional opportunities so better communication between the state office and local groups could help both with participation.

Regionals could also be an ideal way to increase advocacy efforts by WASBO members. The Green Bay/Northeast and Wisconsin Valley regionals have held annual legislative sessions where local politicians of both parties are invited to get feedback from WASBO members and provide their perspectives to the group. The WASBO office and John Forester could help to facilitate those sorts of exchanges at every regional.

Regionals are also an opportunity to cultivate new WASBO leadership, another theme area identified below.

Theme 6: Identify opportunities to use social media as an organization while also helping members to understand and use these tools for themselves and their districts.

Survey results indicate District Professional membership doesn't use social media and many don't know how to use it. While this could be an issue of member demographics, it also represents a missed opportunity for both WASBO and membership. Other associations are embracing social media: WSSCA is doing Twitter chats, tweeting pictures of risks they are identifying, etc... WASDA has used Twitter with some success, as a small group of district administrators have embraced that. If WASBO provided quality content on social media this could both promote the organization, and provide our members with an opportunity to use social media, become comfortable with it, and identify opportunities to use it in their own districts to share their stories.

Theme 7: Identify opportunities to further support Service Affiliate / District Professional relationships

Service Affiliate members, through dues, conference registrations, sponsorships, advertising, and exhibits, represent a significant portion of WASBO's annual revenue, and that revenue allows WASBO to keep District Professional dues and registrations less expensive than they otherwise would be. It is therefore in the membership's interest to identify opportunities that encourage productive relationships for both Service Affiliates and District Professionals. Survey results indicate that many Service Affiliates are relatively new WASBO members, with over 50% members for fewer than five years. With that in mind, this theme would encourage review of:

- Ways to educate vendors on how to effectively work with school districts
- Opportunities to educate both vendors and school district staff on ethics laws

- Identification and promotion of ways for Service Affiliates to become more involved with the organization and share their expertise through committee participation, authoring newsletter articles, submitting calls for presentation, etc.

Theme 8: Leadership development through participation in WASBO

As previously discussed, many WASBO members are new to the organization and/or to their positions. WASBO membership – both District Professionals and Service Affiliates – may not be fully aware of ways to contribute to the organization, and what might be involved in terms of commitment, expertise, etc.

This theme would identify opportunities to build leadership capacity within WASBO, both to assure that our organization is continually developing new leaders for our own sustainability, and to make certain WASBO members have the leadership skills to make their mark in their school districts and communities at large. Several current leaders have expressed concern over burn out, as well as dwindling numbers of volunteers.

WASBO and current leadership could more comprehensively identify volunteer needs, and define roles, anticipated time commitments, and the benefits of accepting those responsibilities. We could also develop a communications plan that not only lets new members know about opportunities, but revisits these opportunities with all members through the year. In addition to a better awareness campaign, personal contact with members to talk with them about how they can contribute is crucial, as many members aren't confident they have something to offer, or aren't aware of volunteer options that would be mutually beneficial. Follow up after volunteer commitment is also critical; this theme would also identify steps the organization can take to keep volunteers engaged and successful.

Theme 9: Encourage the advocacy component of WASBO's three-pronged mission

Networking and Professional Development are two of WASBO's three mission components. The membership survey indicates that WASBO is generally succeeding in meeting the needs of WASBO members on those fronts. Far less member attention seems focused on the third aspect of WASBO's mission - advocating for funding that ensures outstanding educational opportunities for all children in Wisconsin. While this may, in part, be due to the perceived lack of impact in the current political environment, that makes the advocacy component even more critical. This theme looks to identify ways to increase member involvement in advocacy. This may be achieved by looking to increase local contact, for example, on the regional level as previously mentioned. It may also involve training opportunities for advocacy, more closely collaborating with other associations, identifying new ways to educate district constituents on legislative impacts, like Investing in Wisconsin Public Schools map kits, and more.