



Plan Your Annual Meeting From the Outside In! A Case Study in Project management and Leadership

**Date: Monday, March 8th
Time: 1:30 – 2:45PM**

Content Leaders:

**Michael Jacoby, Executive Director, Illinois ASBO
Sue Bertrand, Asst. Executive Director, Illinois ASBO**

**2010 Great Ideas Conference
Colorado Springs, CO**

*All contents copyright 2010, ASAE & The Center for Association Leadership, except noted selections
which have been reprinted with permission of the copyright owner.*



Plan Your Annual Meeting From the Outside In! A Case Study in Project Management and Leadership

Monday, March 8
1:30 - 2:45 PM

Content Leaders:

Michael Jacoby, Executive Director, Illinois ASBO
Sue Bertrand, Asst. Executive Director, Illinois ASBO

www.asaecenter.org



Connecting Great Ideas and Great People

Illinois ASBO - Where We Were - 2007

Executive Leadership Personnel Changes

- E.D. 2006 & Assistant E.D. 2007

Historical Culture

- Staff Longevity
- Silos
- Traditional Authority Structure
- Crisis Oriented

Annual Meeting May 2008

- AMS Conversion December 2007
- Minimal Written Plans
- Speaker Crisis - Almost!
- Policy - No Vacation 6 Weeks Before



Illinois ASBO - Transition

Annual Conference 2008 & 2009 Take Aways

- Build a longer "Work Arc"
- Shift in Staff & Membership Behavior
- Build the Brand "I AM IASBO"
 - I am Networking - I am Learning - I am Running
 - I am Exhibiting - I am Leading - I am Attending

Delegate & Organize

- Placing Key Staff in Team Leader Roles
- Registration Team
- Packet Team
- AV Coordinator
- Banquet Produced as Theater with Producer/Director Roles



Illinois ASBO - Staff Transformation

Increased Expectations & Accountability

- Proving Numbers Ahead of the Event
- (*If we sold 400 banquet tickets, do the orders for beef, chicken and fish add up?*)

Staff Ownership of Ideas - "IASBO Idol"

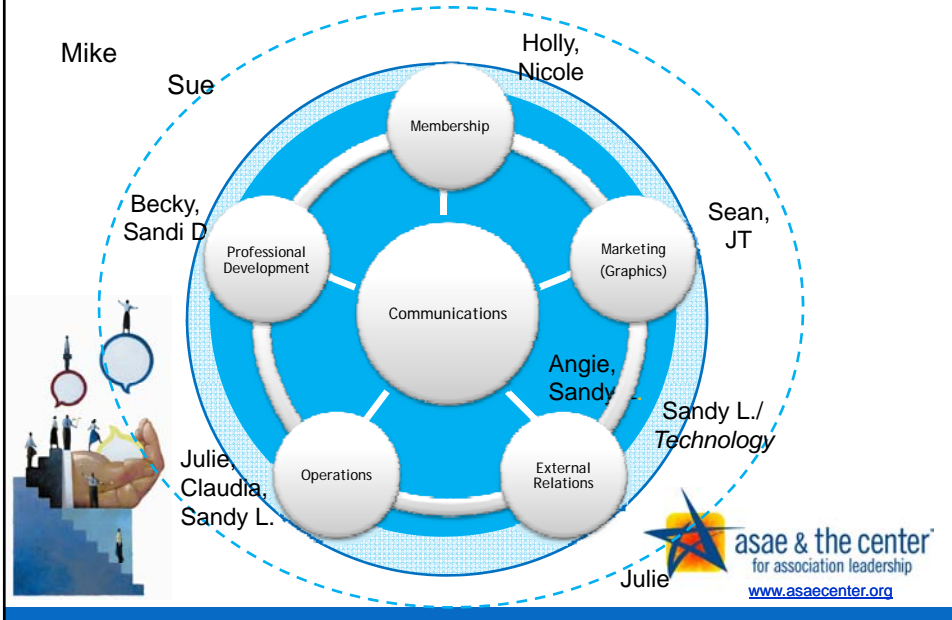
Annual Conference 2009 Debrief

- "Ran smoother than in years past."
- "The months leading up to conference did not seem as stressful this year."

Challenge: Silo Busting Beyond 2009



Transformation: Flatten the Organizational Chart (July, 2009)



Illinois ASBO - Transformation and Project Management

Internal Meetings to Build a More Collaborative Team Based Environment

Time Management Tools

- Office White Board Calendar
- Excel
- Work Arc
- Creative Planning Documents
- Basecamp



Illinois ASBO - Planning Grid AC 2009

2009 Annual Conference		September				October				November				December				January				February					
Planning Guide	Contact	Completed	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
Board Meeting - approval of schedule		DONE	12																								
Publications																											
Publication Planning Meeting	Tech	Ongoing		15																							
SA webpage updates of text	Sean	DONE			6																						
SA e-mail blast	Sean	DONE			13																						
SA post card	Sean	DONE						3									12										
SA Norminbar flyer	Sean																	12									
SA & Sx11 flyer Conf Highlights	Sean																							9			
SD webpage updates of text	Sandy	DONE															24										
SD e-mail blast	Angie	DONE																1									
SD printed brochure	Sean	DONE																							5		
Broadcast e-mail reminders-monthly	Angie	Ongoing																									
Program Content Due	Sean																										
President Welcome	Mohsin	Rec.																									
Tuesday Events & Blurbs	Sue	Reg Piece																									
W-F Session Blurbs	Sue	Reg Piece																									
Exhibitor Guide	Sandy	Need to																									
Special Recognitions	Angie	bring these																									
Silent Auction (?)	Claude	deadlines																									
Board/SAAC Listings	Julie	Forward																									
POC/Regional Chair Listings	Becky/Holly																										
DAA Listing	Holly																										
Staff Listing	Angie																										
House Ads - Silent Auction	Foundation/Chicago 2009																										



Illinois ASBO - Planning Grid AC 2010

Question	Start Date	End Date	Event	7 Am ASBO												8:30 Am ASBO																							
				JAN			FEB			MAR			APR			MAY			JUN			JUL			AUG			SEP			OCT			NOV			DEC		
				1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3			
Update Magazine (Quarterly)	5/1/2010	12/31/2010																																					
Winter 2010 (Business)		28																																					
Spring 2010 (Annual Conf/Preview)		11/29	4/5																																				
Summer 2010 (Hot Topics)		3/29	8/1																																				
Fall 2010 (Memberships)		6/30	10/1																																				
Winter 2011 (Business)		9/13	2/8																																				
Spring 2011 (Annual Conf/Preview)		11/29	4/5																																				
Summer 2011 (Hot Topics)		3/29	8/1																																				
Fall 2011 (Hot Topics)		6/30	10/1																																				
Calendar/Quarterly (Align to Print)																																							
Leadership Institute (Sean to Print)			10/1																																				
Mid-Career Executive 750																																							
DayCare: Teach/On (LT to Print) / Test	New	5/10	10/3																																				
Test composed with the idea of not printing	17th	2/22	6/14																																				
DayCare: ESPP/Next			12/3																																				
DayCare: ESPP/Next																																							
Foundation Voice																																							



Project Management & Basecamp IASBO Annual Conference 2010

Project Management Tool

- Triple Constraints: Time, Cost, Performance
 - Audio Visual Needs for 2010 Example
- Work Breakdown Structure & Cloud Computing
 - Sticky Notes to the 21st Century
<https://illinoisasbo.basecampHQ.com/clients>



Critical Path Method

- Predecessors
- Planning
- Process
- Teams



Basecamp - Cloud Computing

Dashboard Overview of All Projects

Overview of Individual Project

- Messages
- To Do's
- Milestones / Benchmarking / Accountability
- Writeboards
- Files
- Internet Based, Accessible 24/7
- ~ \$50 per month (35 Consecutive Projects)



Illinois ASBO Annual Conference May 19-21, 2010

I AM IASBO Theme Utilized All Year

Program Benchmarks (no more 2007)

- 5/1/10 In House & Done

Banquet Theater Experience

- Script Meeting & Planning

Parade of Vendors & Leadership

Foundation Emerges as New Entity

- Golf
- Silent Auction
- Eco Phones Fundraiser



Annual Conference - Theme 2010

I AM IASBO 2010 Yearly Theme

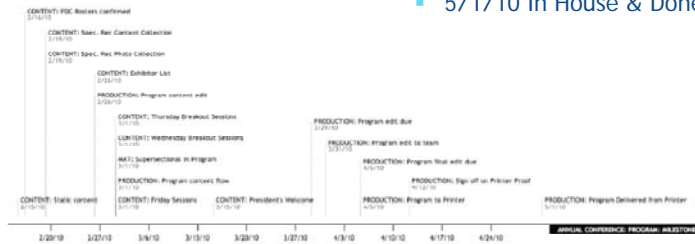
Buttons distributed throughout the year at specific member events



Annual Conference - Program 2010

Program Benchmarks

- 5/1/10 In House & Done



Annual Conference - Experience 2010

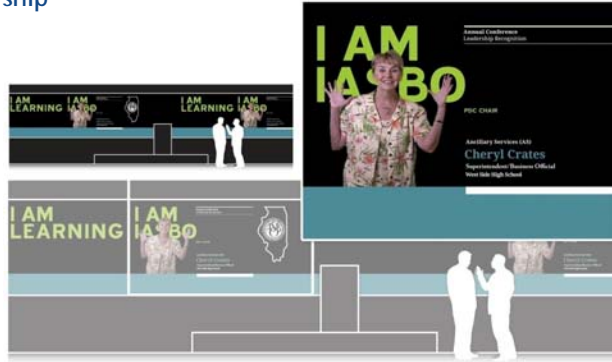
Banquet Theater Experience

- Script Meeting & Planning
- Parade of Vendors



Annual Conference - Experience 2010

Banquet Theater Experience
Leadership



Annual Conference - Foundation 2010

FOUNDATION
The Illinois ASBO Foundation has created three ways for members to ensure the advancement of the school business profession.

I AM GIVING

SILENT AUCTION
Every year the Illinois ASBO Foundation holds the Silent Auction in tandem with the Annual Conference. This event is created for members to donate items that generate revenue to support of the Foundation.

Get back for giving.
For every bid on an item, the individual bidder's name will be placed in a drawing to win a FREE Illinois ASBO Professional Development seminar.

**DEADLINE FOR SUBMISSIONS: APRIL 30, 2010
SUBMIT AN ITEM TODAY**

GOLF RAFFLE
The Annual Foundation Golf Outing has reimagined the raffle to create a unique way to donate. Raffle tickets will cost \$5 a piece or five tickets for \$25. Each ticket becomes eligible for a variety of unique prizes.

Raffle prizes include:

- Nintendo Wii
- Flip Street/Concorde
- GolfLugs GPS by Garmin
- i GB Apple iPod touch
- This more ...

ECO-DONATE
Have old cell phones or electronic equipment? This year the Illinois ASBO Foundation and the Sustainability Professional Development Committee will be collecting these items throughout the Annual Conference.

Acceptable items include:

- Cell phones
- Laptops and notebooks
- MP3 players
- Digital cameras
- This more ...

NETWORK THROUGH DONING FOR ADVANCEMENT - REGISTRATION OPENS APRIL 9

HELP OUR GREEN INITIATIVE BY DONATING DURING ANNUAL CONFERENCE MAY 19-21

ANNUAL CONFERENCE & EXHIBITS / PLEASANT RUN RESORT, ST. CHARLES MAY 19-21 / WWW.IASBO.ORG/AC2010

Foundation Emerges as New Entity

- Golf Raffle
- Silent Auction
- Eco Phones Fundraiser



Leadership in Annual Conference Transformation

Breakdown of Silos

Staff Empowerment

- Changes in Roles and Responsibilities
- Accountability / Transparency / Collaboration
- Meeting Deadlines

Staff Experience

- Less Stress
- Smoother On-Site Experience
- Annual Conference 2009 Best Project Experience by All Staff

Member Experience

- Excellent Feedback

Conference

- Better Organized / Better Documented



Illinois ASBO - Where We Are in 2010

- Better Documented Conference Planning
- Longer Work Arc
- Use of Project Management Concepts & Tools
- Collaborative Staff
- Team Focused Work Behaviors
- Ownership by All



Illinois ASBO - Contact Information

Michael Jacoby, Ed. D.

Executive Director
Illinois Association of School Business Officials
mjacoby@niu.edu

Sue Bertrand

Assistant Executive Director
Illinois Association of School Business Officials
sbertrand@niu.edu
815-753-9368

www.iasbo.org



2009 Annual Conference			September				October				November				December				January				February			
Planning Guide	Contact	Completed	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Board Meeting - approval of schedule		DONE		12																						
Publications																										
Publication Planning Meeting	Tech D	Ongoing			15																					
SA webpage updates of text	Sean/A	DONE					6																			
SA e-mail blast	Sean	DONE						13																		
SA post card	Sean	DONE									3								12							
SA Nonmember flyer	Sean	Need to discuss new deadline																	12							
SA 8.5x11 flyer Conf Highlights	Sean																			9						
SD webpage updates of text	Sandy/	DONE												24												
SD e-mail blast	Angie/s	DONE															1									
SD printed brochure	Sean	DONE																		5						
Broadcast e-mail reminders-monthly	Angie	Ongoing																								
Program Content Due	Sean																									
President Welcome	Mohsin	Rec.																*								
Tuesday Events & Blurbs	Sue/Be	Should have this from the SD Reg Piece																								
W-F Session Blurbs	Sue/Be	3.10.09																								
Exhibitor Guide	Sandi	Need to																								
Special Recognitions	Angie	bring these																								
Silent Auction (?)	Claudia	deadlines																								
Board/SAAC Listings	Julie	forward																								
PDC/Regional Chair Listings	Becky/Holly																									
DAA Listing	Holly																									
Staff Listing	Angie																									
House Ads - Silent Auction/Foundation/Chicago 2009																										

