



Cal-ISBOA DEI Standards Planning Document

As of January 27, 2022

1. LEADERSHIP

1.1 The board commits to use DEI principles to guide the work of the association, to develop a written plan to actualize these standards, and to ensure that the association's work to meet these standards is sustained over the long term.

Activities to Implement Standard	Timeline	Who is Responsible
Board adopts DEI Standards & DEI Planning Document.	January 2022	Board, Task Force and Executive Director
Board members and staff will review Standards and Plan each year and sign a commitment document.	Annually (September)	Board and Cal-ISBOA Staff
Board President will report annually the status of DEI Standards and Initiatives at the annual meeting.	Annual Meeting (May)	Board President

1.2 The board will promote and disseminate the DEI principles to all Cal-ISBOA membership and actively engage the members in participating and contributing to the implementation of DEI principles and standards.

Activities to Implement Standard	Timeline	Who is Responsible
Board will publish DEI Standards and Plan on the Cal-ISBOA website once adopted.	February 2022	Executive Director & Cal-ISBOA Staff
Board will publish the Annual Meeting DEI Standards and Progress Report on the website.	Annually (May)	Cal-ISBOA Staff
Board will schedule facilitated member forums to discuss DEI Standards and progress. The Board will select dates in January for the next fiscal year.	Semi-Annually	Board

1.3 The board will commit to learn and practice excellent cultural diversity skills.

Activities to Implement Standard	Timeline	Who is Responsible
Board will review list of DEI education opportunities from DEI Task Force and Staff.	Annually	Board President, Board, Executive Director, Task Force

Board will have access to DEI education resources on the Board Portal.	Ongoing	Board
--	---------	-------

1.4 The board will make its membership more diverse, inclusive, welcoming and representative of the diversity of our state.

Activities to Implement Standard	Timeline	Who is Responsible
Board will have a DEI facilitated conversation to identify potential areas for added diversity and ways to attract involvement of diverse members. This could include more actively communicating areas for volunteer leadership and participation.	May 2022	Board President, Governance Committee, Executive Director
Communicate involvement opportunities to membership.	Semi-annually, June and January and as needed	Governance Committee
Board will review by-laws to assess if the board membership eligibility criteria provide a diverse pool of board candidates.	October 2022	Governance Committee
Board will reach out to other associations and review their by-laws to see how they are addressing DEI initiatives around membership.	August 2022	Governance Committee and Executive Director

1.5 The board will encourage opinions and contributions from members with different perspectives and ideas on how we can collectively improve our DEI practices.

Activities to Implement Standard	Timeline	Who is Responsible
Board will engage the services of a DEI professional skilled in designing DEI surveys and facilitating in person discussion and focus groups.	Initiated by December 2022	Task Force and Executive Director
Board will oversee the development of an annual DEI campaign to encourage members to share ideas and perspectives in a variety of formats.	Spring of 2023	Board, Task Force, and Cal-ISBOA Staff

1.6 The board will measure and evaluate progress in the execution of our DEI plans.

Activities to Implement Standard	Timeline	Who is Responsible
Track participation in programs using data analytics and surveys.	Measure by December of 2022 and ongoing.	Executive Director and Cal-ISBOA Staff
Board will discuss all DEI initiatives annually at the January Board Meeting including the resources needed to support the initiatives and activities in the coming year.	Annually (January)	Board

2. EDUCATION

2.1 All staff and board members will receive a minimum of eight hours of DEI training each year.

Activities to Implement Standard	Timeline	Who is Responsible
<p>Communicate to Cal-ISBOA staff and board members the type of DEI training that Cal-ISBOA will accept.</p> <p>The minimum of eight hours of DEI training can be accomplished by participating in training directly offered or communicated by Cal-ISBOA or by participating in training offered at board members’ schools or other individually attended events.</p>	January 2022 Board Meeting	Executive Director
A minimum of 16 hours (double the required 8 hours) of cumulative DEI training opportunities will be offered to Cal-ISBOA staff and board members. Cal-ISBOA will offer the training directly during Cal-ISBOA events, webinars or meetings, and Cal-ISBOA will actively identify and communicate DEI training opportunities sponsored by other entities to share with staff and board members.	Ongoing	Cal-ISBOA Staff
Determine specific DEI training opportunities to offer during Cal-ISBOA sponsored events along other DEI training opportunities sponsored by other entities.	January - June 2022	Cal-ISBOA Staff and Task Force
Staff and board members will be required to report their DEI training including the training name, sponsor, number of hours, and topic of training utilizing a Google form which will be provided.	Launch July 2022 and ongoing	Cal-ISBOA Staff

2.2 The association will recommend that its individual members receive a minimum of eight hours of DEI training each year.

Activities to Implement Standard	Timeline	Who is Responsible
Cal-ISBOA will either directly offer DEI training through its own events or communicate DEI training opportunities offered by other entities to its members.	Ongoing	Cal-ISBOA Staff and Task Force
In the spirit of sharing learning opportunities, members will be encouraged to report their DEI training including the training name, sponsor, number of hours, and topic of training utilizing a Google form which will be provided on the DEI Resource page. The form link will be sent after Cal-ISBOA sponsored events and periodically via email.	2022	Cal-ISBOA Staff

2.3 The association will ensure that individuals are made aware of ongoing opportunities to learn about diversity, equity and inclusion and apply those learnings in their work environments.

Activities to Implement Standard	Timeline	Who is Responsible
A minimum of 16 hours (double the recommended 8 hours) of cumulative DEI training opportunities will be offered to association members. Cal-ISBOA will offer the training directly during Cal-ISBOA events, webinars or meetings, and will actively identify and communicate DEI training opportunities sponsored by other entities to share with association members.	Ongoing	Cal-ISBOA Staff and Task Force

2.4 Training in this section should especially include the following topics:

- a. How to increase and retain the diversity of school faculty, administrators and staff.
- b. The impact of culture on behavior, attitudes, beliefs and values.
- c. Cultural conditioning and its effect on intercultural interaction and communication.
- d. Oppression and its effect on individuals in society.
- e. Cultural privilege and its absence, and the importance of addressing stereotypes, biases and misinformation held about people outside the mainstream population.

Activities to Implement Standard	Timeline	Who is Responsible
<p>Training opportunities offered by Cal-ISBOA or its partners or training self-reported by members should fall within the above 6 topics. When training is reported, members will be surveyed on whether the training touched on one or more of the six topic areas in the standard. The Google form link will be sent after Cal-ISBOA sponsored events and periodically via email.</p>	<p>Ongoing after Cal-ISBOA training events and on annual survey.</p>	<p>Cal-ISBOA Staff</p>
<p>Create a DEI resource page on the Cal-ISBOA website that highlights Cal-ISBOA’s DEI Standards, upcoming training opportunities (webinars, conference, events, books, video links, blogs, Ted talks, etc.)</p> <p>In the spirit of sharing learning opportunities, the resource page will also include the link to a Google form for members to self-report their DEI training.</p>	<p>Within six months following Board adoption of standards</p>	<p>Cal-ISBOA Staff and Taskforce</p>

3. PROGRAMS

3.1 The association will develop an internship program to bring greater attention to the job opportunities as a school business officer and in the various positions in school operations. The internship program will have a focus on individuals from historically marginalized populations and those who follow non-traditional paths.

Activities to Implement Standard	Timeline	Who is Responsible
<p>The board will establish a working group to implement Section 3.1 (on internship) of the Cal-ISBOA DEI Standards.</p> <p>The working group will be composed of the executive director, a board member, individuals from Cal-ISBOA member schools, and individuals from higher education who can offer assistance in designing a robust internship program that attracts people from historically marginalized populations and those who may “follow non-traditional paths” to working in school business offices.</p> <p>The working group will be charged with developing the internship program with focus populations that include, but should not be limited to, undergraduates and people who are early in their business careers.</p>	<p>July 2022</p>	<p>Board</p>
<p>The working group will design and develop the internship program in and with the cooperation of Cal-ISBOA member schools.</p>	<p>July 2023</p>	<p>Cal-ISBOA Internship Program Working Group</p>

Factors to be considered include, but are not limited to: <ul style="list-style-type: none"> ● Process to select participant schools. ● Whether or not a pilot program should be run prior to launching the full program. ● Time commitment involved for participant schools-is participation periodic? ● What oversight structure should be included? ● What metrics will be used to evaluate the efficacy of the program? 		
The working group will issue a written report to the Board on its progress and recommendations for a successful launch of the internship program.	July 2023	Cal-ISBOA Internship Program Working Group
The board will review the Working Group’s report and make adjustments to its plan/programming and operation as appropriate.	September 2023	Board
Based on feedback and comments from the board, implementation begins.	January 2024	Cal-ISBOA Internship Program Working Group/Volunteer (Host) Schools
Working group will review the program, assess effectiveness of the program and recommend improvements to the board, if needed.	January 2025 and ongoing each year	Cal-ISBOA Internship Program Working Group
The board will review the annual internship program report, make recommendations for changes and/or recommend continuation of the program.	January 2025 and ongoing each year	Board

3.2 The association will develop a mentorship program to help new finance and operations administrators in their jobs. The mentorship program will have specific emphasis on helping those from marginalized populations to thrive in their new positions.

Activities to Implement Standard	Timeline	Who is Responsible
The Board will establish a working group to implement Section 3.2 (on mentorship) of the Cal-ISBOA DEI Standards. The working group will be composed of the Executive Director, a board member, and individuals from Cal-ISBOA member schools.	June 2022	Board
The Working Group will be charged with developing the mentorship program focusing on new business officers who are members of historically marginalized populations and those who may “follow non-traditional paths” to	July 2022	Cal-ISBOA Mentorship Program Working Group

<p>working in school business offices.</p> <p>Factors to be considered include, but are not limited to:</p> <ul style="list-style-type: none"> ● Training program for mentors ● Time commitment and length of mentorship ● Expectations for Mentors ● Expectations for Mentees ● Expectation for Cal-ISBOA Executive Director 		
The Working Group will issue a written report and participant guide to the Board for review.	August 2022	Cal-ISBOA Mentorship Program Working Group
The board will review the Working Group’s report and guide and make recommendations for adjustments to the program and/or guide.	September 2022	Board
Based on feedback and comments from the Board, implementation begins.	September 2022	Cal-ISBOA Mentorship Program Working Group, Executive Director, Volunteer Business Officer Mentors
Working group will review the program, assess effectiveness of the program and recommend improvements to the board, if needed.	May 2023	Cal-ISBOA Mentorship Program Working Group

4. COMMUNICATIONS

4.1 The association’s communications must be inclusive, welcoming, mindful of systemic oppression, and in alignment with Cal-ISBOA DEI Principles.

Activities to Implement Standard	Timeline	Who is Responsible
The board will develop written guidelines by which all communication will be inclusive, welcoming and mindful of systemic oppression. This document will serve as a tool so that consistent communication is mindful of historically marginalized populations, will use inclusive terminology, and will avoid suggestive phrases, acronyms and unintentional bias. The board may engage the services of an outside firm or working group to accomplish this.	Within 12 months following Board adoption of standards	Executive Director and Board

The board will review and provide feedback annually on internal and external communications to ensure that it is within the framework of the formal document adopted.	Annually	Board
---	----------	-------

4.2 The association’s DEI work will be prominent in its communications to the public and will also ensure that such communication is part of outreach to people from marginalized populations.

Activities to Implement Standard	Timeline	Who is Responsible
Cal-ISBOA will publicize DEI Principles by posting them in an official Blog, on the Cal-ISBOA website, and on social media platforms.	Within six months following Board adoption of standards.	Cal-ISBOA Staff, Task Force
Cal-ISBOA will outreach to people from marginalized populations by identifying publications, media outlets, and social media platforms that serve marginalized populations. Cal-ISBOA will outreach and communicate on social media platforms and publications specific to marginalized populations.	Within 12 months following Board adoption of standards.	Staff, Task Force

4.3 The association’s communications must seek to engage people from historically marginalized populations by demonstrating knowledge and respect for their identities and experiences.

Activities to Implement Standard	Timeline	Who is Responsible
Cal-ISBOA will engage people from marginalized populations by: <ul style="list-style-type: none"> Facilitating focus groups on topics of cultural diversity. Using surveys to gain insights on the lived experiences of people from marginalized populations. Inviting speakers from marginalized populations to present at conferences and seminars. Featuring topics that focus on DEI issues or have impacts on DEI issues at conferences and seminars. Encouraging membership of schools in communities with high percentages of people from marginalized populations. 	Within 12 months following Board adoption of standards.	Staff, Task Force

5. CORPORATE PARTNERS/VENDORS

5.1 Cal-ISBOA will prioritize building relationships and identifying opportunities for small, minority-owned, women-owned, disadvantaged, disability-owned, veteran-owned, LGBTQ+-owned and other enterprises to compete for business whenever possible.

Categories of businesses Cal-ISBOA may consider include, but are not limited to, the following:

- a) Minority-owned Business Enterprises (MBE)
- b) Small and Medium Businesses Enterprises (SMES)
- c) Woman-owned Business Enterprises (WBE)
- d) Lesbian, Gay, Bisexual, Transgender-owned Business Enterprises (LGBTBE)
- e) Disability-owned Business Enterprises
- f) Small Disadvantaged Businesses (SDB)
- g) Historically Underutilized Businesses (HUB Zone)
- h) Veteran-owned Businesses (VBE)
- i) Service-disabled Veteran-owned Businesses (SDVBE)

Activities to Implement Standard	Timeline	Who is Responsible
Create a live resource page or document (on our Membership Resource page) with links for easier reference in locating certified and non-certified businesses represented by individuals from marginalized populations. This would also allow for easy updating.	December 31, 2022	Task Force Co-Chairs and Executive Director

5.2 The association will work with existing corporate partners and resources to communicate our DEI Standards and learn about their commitment to and efforts in DEI.

Activities to Implement Standard	Timeline	Who is Responsible
Insert language in RFPs and on the Cal-ISBOA website that explicitly states and invites participation from small, minority-owned, women-owned, disadvantaged, disability-owned, veteran-owned, LGBTQ+-owned businesses.	December 31, 2022	Executive Director and Staff
Inform and educate new board members as they come on, that this is a Cal-ISBOA initiative.	Ongoing	Board Chair, Executive Committee, and Executive Director
Share our DEI Principles and Standards with our existing partners and vendors to inform them of our focus on this criteria as we move forward.	December 31, 2022	Executive Director

From sharing our DEI Principles and Standards we can inquire of our partners if their philosophies and practices are congruent with ours.	Ongoing	Board Committees, and Executive Director and Membership Engagement Manager
---	---------	--