Iowa Business Education Association
Strategic Planning Meeting
Friday, July 8, 2011
Fairfield Inn – Ankeny, IA

Call to Order: President Sharon Keehner welcomed everyone and called the meeting to order at 10:07am. Present were: Sharon Keehner, Amanda Eberhart, Kathy Larson, Sandy Warning, Deb Jones, Lois Roth, Kelli Diemer, Susan Seuferer, Naomi Yaddof, Patrick Geer, and Samra Olofson.

Opening Comments: Kelli Diemer spoke with Colleen Hunt and was asked to relay the message of "bravo to IBEA" for being proactive with the organization and being willing to look at the organizations strengths, weaknesses, opportunities, and threats. Kelli mimicked the same message and thanked all attendees for being passionate about Career & Technical Education, CTSOs, and Business Education.

Identify Core Values (Sharon Keehner): Core values are beliefs that are extremely important to the success of an organization. These beliefs are non-negotiable and should be important 10 years from now. Groups of 3 were formed and a brainstorming session was held. Groups shared the values that they came up with, and then four core values were written based on the results.

1. Lead with an ongoing vision for growth in Business Education.

2. Provide effective, open, and proactive communication through networking and mentoring opportunities.

3. Offer quality professional development opportunities and facilitate curriculum exchange.

4. Provide outreach and accessibility to connect educators with employers and other stakeholders.

Purpose of IBEA (Deb Jones): Each individual was asked to write three statements on why they joined IBEA. The statements were shared with the entire group, and then focus was shifted towards creating a new mission statement. The old purpose statement read "The purpose of IBEA is to discover and serve the needs of Business Educators in Iowa". The executive board created the new statement:

IBEA serves Business Educators in Iowa by:
- Leading with an ongoing vision for growth in Business Education.
- Providing effective, open, and proactive communication through networking and mentoring opportunities.
- Offering quality professional development opportunities and facilitating curriculum exchange.
- Providing outreach and accessibility to connect educators with employers and other stakeholders.

SWOT Analysis (Patrick Geer): Individuals divided into groups of three and brainstormed strengths, weaknesses, opportunities, and threats of the current organization. Ideas were shared with the group and a discussion was held on what the main strengths, weaknesses, opportunities, and threats of the organization should be.

> Strengths: Collaboration, professional development, convention, & linkage to other organizations.
> Weaknesses: Networking, promotion, digital interaction, membership numbers, status quo, and board structure.
> Opportunities: Outreach to teaching students, access to materials/lessons/curriculum, mentoring, promotion of image/need for business skills, outreach to business teachers, and legislative.
> Threats: Lack of understanding of administration, competition of other organizations/activities, generational differences, and external environment.

SWOT Gap Analysis (Sandy Warning): After determining IBEA's strengths, weaknesses, opportunities, and threats, the group evaluated the elements and determined whether there was a gap present. See attachment at the end of the minutes for the Gap SWOT Analysis.

Strategic Actions (Patrick Geer): A plan of action needs to be in place so that the organization's goals can be accomplished. The executive board created six goals, and the SWOT analysis was used to create new goals. After a discussion, the first two columns of the strategic plan worksheet were completed. The remainder of the strategic plan will be completed on August 5th after the Tax Free Workshop. See the attachment for the semi-completed strategic plan.

Closing Comments: Sharon thanked everyone for coming to the meeting. Members were asked to look at their tasks and have something to report by August 5th.

Adjournment: The meeting was adjourned at 2:53pm. The next meeting will be held August 5th in Des Moines at Wells Fargo.

Submitted by Amanda Eberhart, Secretary

Attachment

IBEA Strategic Planning 2011-12

SWOT Element	Comment on Current Strategy	Gap or No Gap
Leveraging Strengths		
Conference	Speakers inspire, educators receive curriculum updates, pd, comradery, relevant breakout sessions Lacking marketing and getting people there	GAP
PD	Conference breakout sessions, summer workshops, grad credit available, ½ day teacher work day Lack of mentoring for new members/teachers	GAP
Collaboration	Offer curriculum ideas, facebook, area meetings, web page Could do more digitally Need to inform people on "how to"	GAP
Linkages to other organizations	IACTE, NBEA, What do we get from being members? We don't take advantage of what's being offered.	GAP
Mitigating Weaknesses		
Networking	Improve communication tools Face-to-face could be important	GAP
Promotion	e-mail blasts, people don't read; sent letters to all business educators through AEA; Lack of Materials	GAP

Digital Communication	Facebook e-mails web page	GAP
Board structure	Lack of committees Lack of response to orientation	GAP
Membership Numbers	Become member with conf registration, people don't send in registration only Don't see value in joining	GAP
Status Quo	Organization is slow to change	
Taking Advantage of Opportunities		
Outreach to student teachers	UNI, Wm Penn, Ashford, BV, UIU provide link to IBEA	GAP
Access to materials/ lessons/curriculum	Offer at conference and workshops	GAP
Mentoring	Session at conference Prog Mgt is inactive	GAP

Promotion	e-mail blasts web page need to reach new teachers	GAP
Legislative	Liaison to IACTE	GAP
Mitigating Threats		
Lack of understanding with administrators	Lacking	GAP
Competition from other organizations/ activities	Fall conference creates many conflicts; ITEC	GAP
Generational change	Younger teachers don't see relevance	GAP
External environment	Funding Time off from school	GAP

1. Goal Statement What do you want to accomplish? What is the need? What is the focus? Is it narrow enough to accomplish?	2. Action Steps/ Implementation Design Who, What, When, Etc.? Timelines, arrangements, division of responsibilities?	3. Support Needs What do you need for success? Costs?	4. Specific Outcomes/ Success Criteria Success criteria--what might you see, hear, feel, etc. when it is completed?	5. Gathering Data Monitoring/Analysis/Evaluation How will you know you reached your outcomes?
Increase membership	1. Ning to share and get curriculum – webmaster 2. Shirts for conference – president-elect and registration chair 3. Bring a member, get a prize; prize chair and registration chair 4. New member drawing; president-elect and registration chair 5. Establish membership committee – executive secretary a. membership drive that is not conference driven			
Improve communication	1. Communication committee – PR Chair a. Include secondary, community college, and four-year faculty			
Bridge generation gap	1. Do research on other organizations to see what they are doing – Past President 2. Survey business teachers, possibly by phone – area reps a. invite them to join IBEA 3. Get young teachers involved – see Improve			

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	Image section			
Review IBEA structure	1. Review area rep region, possibly by community college – president 2. Provide promotional tools to area reps – PR Chair and executive secretary 3. Provide area rep breakfast – president-elect – 2011 conference 4. Provide electronic materials to area reps - webmaster			
Improve lobbying	1. Business Legislative Day – IACTE/Legislative; President, members, and students should attend, plan during school year; 2. Inform members of who their legislators are and encourage them to contact – IACTE/Legislative			
Improve image	1. Board members network with everyone, not just people we know at conference – board members 2. Get young people on planning committee –			

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	president-elect 3. Get young people on board of directors – Past President 4. Provide "fun" activities – president-elect 5. Provide immediate benefit such as readily available curriculum ideas on web page – committee – Lois Roth, webmaster with all board members submitting ideas			