

# EDUCATION SERVICES CATALOGUE

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JUNE 18, 2018

This catalogue contains the listing of education services from ASBA

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UPDATED JUNE 2018

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## ABOUT ASBA EDUCATION SERVICES TEAM

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The Alberta School Boards Association, ASBA, has been offering education services for the past two decades. While the team has evolved over the years, the pursuit of excellence in services and products to support and improve school boards leadership in governance has never been stronger.

This catalogue represents a new chapter in the history of the team, becoming a communication and process tool, to provide clarity in the types of services currently offered as well as streamlining processes to best address member boards needs.

The catalogue offers details about the current team members, their backgrounds and strengths as well as expertise. It outlines the three main categories of offerings the team specializes in providing as well as listing the currently specific session and project services the team can readily offer to all members.

This catalogue will be updated regularly to reflect changes in requests and new ways to meet member's needs.

If a service you require is not specifically listed in this catalogue do not hesitate to contact us directly and we will work a customized plan to address your need.

All offerings are costed out at the current hourly rate of \$250.00 (including travel, accommodations and meals).

This catalogue can be found online at <http://www.asba.ab.ca/services/consulting/governance/>.

## The Education Services Team



### **Jim Gibbons | Senior Education Consultant**

Jim Gibbons has served in a variety of educational leadership positions from teacher, principal and deputy superintendent. He served as Superintendent of Chinook's Edge School Division No. 73 (CESD) for 11 years, until his retirement in 2010. Jim has served as president of the College of Alberta School Superintendents, the Canadian Association of School System Administrators and as a member of the Governing Board of the American superintendent's association (AASA). He was appointed, by the Education Minister, as Chair of the Council on Alberta Teaching Standards (2003-2009), to the Senate of the University of Calgary (2005-2011) and by the Advanced Education Minister to Alberta's Council on Admissions and Transfer (2011-2017). He has served on the Minister's steering committee for *Inspiring Education*, focused on the informed transformation of the education system, the Education Act Regulatory Review Committee and the Results Based Budgeting Challenge Panel.

Jim was awarded the Alberta Centennial Medal, and more recently the EXL award from Xerox for his leadership in education. He was awarded an honorary degree from Olds College at convocation in June, 2010.

Jim assumed the role of Senior Education Advisor to ASBA in June of 2010 and has been supporting school boards in such areas as CEO recruitment, CEO evaluation, Board self-evaluation, ward reviews, organizational reviews, board governance workshops, conflict resolution and policy review. Jim served as acting executive director of ASBA for five months (July-Nov), 2016.



### **Terry Gunderson | Education Consultant**

Following a very successful 35 year career in education which culminated in his appointment as the first Superintendent of the newly regionalized Elk Island Public Schools Regional Division, Terry has delivered services as an educational consultant for ASBA for the past 17 years. Terry facilitates executive searches, Board evaluations, Superintendent and other administrative evaluations, strategic planning sessions, policy redevelopment and review and Board governance workshops. Terry has served as a member of a number of Boards – the Lakeland College Board of Governors, the APEGGA Board of Examiners, the County Clothesline Board of Directors in Sherwood Park and the provincial Safe and Caring Schools and Communities Board of Directors to name four.

Terry has a firm belief in the value of democratically elected local school Boards. Most recently, Terry received the President's Award from the Alberta School Councils Association as an acknowledgement for his contribution to education in this province. He is also a former recipient of the Alberta School Boards Association President's Award.

Terry holds a Bachelor of Education degree with great distinction, Bachelor of Science degree cum laude, Master of Education in Educational Administration, Strategic Planning Certificate, OneSmartWorld Certificate (Thinking Styles Assessment and Cohesive Team Building Certificate



### Tash Taylor | ASBA School Boards Consultant

Tash is a management consultant and leadership coach, specializing in all aspects of board governance, organizational and individual performance, team dynamics, strategy, issues management, and stakeholder engagement.

Tash is bilingual in French and English, and pleased to assist boards with a range of services including facilitating leadership retreats, board workshops, and focus groups. As a certified coach, Tash skillfully works with teams and individuals through their unique situations whether dealing with conflict or uncertainty, and serves as a professional resource to leverage potential and improve positive performance. Tash also conducts board and superintendent evaluations, organizational reviews, risk and culture audits, and policy reviews.

Tash brings over 25 years leadership and consulting experience in the community sector, working and consulting with public and non-profit organizations, government, elected officials, municipalities, and indigenous communities. Her active career includes serving in an executive capacity as Board and Executive advisor with one of Canada's largest school authorities, and serving as Chief of Staff and Strategy in the post-secondary sector. Additionally, Tash was appointed on two occasions as inaugural Executive Director, to establish new provincial non-profit organizations: Alberta's Youth Volunteer, and the Alberta Non-Profit Housing Association (ANPHA).

Tash's work led to her invitation by the Federal Government to join the Official Canadian Delegation at the UN Summit for Community Sustainability held in Quito, Ecuador, in 2016. Tash also served on the Government of Alberta's Steering Committee for the province's first Affordable Housing Strategy.

Tash holds an MBA specializing in Executive Management, has her Diploma in Management Consulting, and holds executive Coaching and Canadian Risk Management Designations. Tash also has completed the Queen's University Strategy and Strategic Analytics Program, and is a trained practitioner in measuring social return on investment using international methodologies.

She is a member of, the Canadian Association of Management Consultants, the International Association of Public Participation (IAP2), the Global Risk Management Institute, and the International Coach Federation, and the Institute of Corporate Directors

She currently sits on the Teacher Service Qualifications Board, serves on the Board of Governors of the Alberta Real Estate Foundation, and recently served as Vice-President of the Canadian Housing and Renewal Association in Ottawa.

Tash's Passion Statement: *"Many times people know what they want, but don't always know what is needed or how to get there. To me, there's nothing more invigorating than collaborating with clients in finding a way forward and exceeding their expectations."*

## SERVICE OFFERINGS

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### 1. PROFESSIONAL SERVICES

Professional services include services where a tangible deliverable or product provided at the completion of the engagement, usually accompanied by some analysis. Typically, a professional service engagement is treated similar to a project, with a start and completion date, estimated costs quoted upfront, and an expected product at the conclusion. ASBA offers a broad range of professional services to school boards across the province.

### 2. PROFESSIONAL DEVELOPMENT

Professional development includes education or skill improvement opportunities. ASBA delivers onsite workshops on a variety of topics. ASBA also offers custom workshops based on the unique needs and situation of the school board. Professional development is typically charged on a per event or course basis; however, this may depend on the complexity of the engagement

### 3. LEADERSHIP SERVICES

Leadership services include offerings which may be on an individual basis, ad-hoc or one-time basis, and typically with no fixed timeline associated. Services within this category may include general advisory services, leadership coaching, as examples.-Leadership services are typically charged on a direct hourly basis, or a retained service arrangement may be established.

## REQUESTING PROCESS

All services listed in this catalogue indicate a general email address as contact information. Interested member boards and trustees can initiate a request for further information or to request a specific service by emailing directly the team at: [reception@asba.ab.ca](mailto:reception@asba.ab.ca) . The email will be acknowledged and a follow up message with further contact and details will be sent to initiate the request within 48-hours.

\* The Canadian Association of Management Consultants' Code of Professional Conduct states members shall not begin an assignment until the client has accepted written agreement.

## PROFESSIONAL SERVICES

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- Employee engagement surveys
- Executive recruitment
- Facilitation (meetings, focus groups, forums)
- Governance reviews\*
- Planning and leadership retreats
- Organizational assessments
  - Department/site reviews
  - Full organizational reviews
  - Functional area reviews
    - Central office organization
    - Demographics and school viability
    - Transportation
    - Ward boundaries
- Organizational culture audit \*\*
- Performance assessments
  - Board self-evaluation
  - CEO/Superintendent evaluation
  - 360° Leadership appraisal
- Policy and procedure review and development
- Public and stakeholder engagement
  - Stakeholder mapping and analysis
  - Survey administration and analysis
- Strategic planning

\* A governance review is a detailed examination of the governance of the organization to gain insights into areas of opportunity and strength. The process consists of observation of board activities, interviews with board members and executives, and discussions with key stakeholders. Using an objective methodology, the Board will receive a report with analysis on various dimensions of the organization's governance, its culture and practices, and includes recommendations for improvement.

\*\*A culture audit is a detailed examination of an organization's cultural characteristics (such as its assumptions, norms, philosophy, and values) to determine whether they hinder or support its vision and mission. The process aims to identify risks and leverage strengths by examining four key pillars: employee perceptions of leadership, workforce measures, directives and processes, recognition and consequences. The Board will receive a detailed report with recommendations for improvement.

## PROFESSIONAL DEVELOPMENT

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- **Advocacy**
  - Being Heard, Not Just Listened To
- **Governance Matters**
  - Audit Committee Best Practices
  - Better Meetings, Better Results (Effective meetings)
  - Beyond Governance Basics (Intended as a Part II from Board Orientation)
  - Board Orientation
  - Governance at Your Best (Intended as a Part III from Board Orientation)
  - Policy Principles (Policy support)
  - Strengthening the Board - Superintendent partnership (Board/Superintendent relations)
- **Public Engagement**
  - Principles of Public Participation
- **Team/ Group Effectiveness**
  - Five Behaviors of a Cohesive Team
  - Great Leaders, Great Teams, Great Results
  - Stephen Covey's Seven Habits of Highly Effective People
  - Working better together – uniquely customized workshop for your group

*Additional instruments may be employed and debriefed including: MBTI, Strengths Finder 2.0, DISC, Team Diagnostic™, and Thomas Killman Conflict Modes (TKI). The ASBA is licensed to deliver Stephen Covey's Seven Habits of Highly Effective People and The Four Roles of Leadership as well as One Smart World 4Di thinking styles. Other customized workshops are available.*

## LEADERSHIP SERVICES

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### **Advisory Services and Coaching**

Trustees, board chairs, and key administrators may benefit from a professional consulting relationship to enhance their leadership skills and effectiveness. Honest, insightful feedback and the resources of an experienced consultant can uncover new solutions, confidence, and approaches.

### **Advisory Services**

ASBA offers confidential advisory services to help trustees and school boards acquire the support, knowledge and know-how they seek in developing a healthy and successful organization.

### **Professional Coaching**

*“Coaching is not telling people what to do; it’s giving them a chance to examine what they are doing in light of their intentions.”* - James Flaherty

ASBA is pleased to offer accredited coaching services for trustees and school boards. Our coaching service provides a confidential, results-oriented process designed to drive purposeful improvement and performance enhancement through constructive dialogue and technique. Three types of professional coaching are available: individual, team and group coaching.

- Group Coaching
- Personal Leadership Coaching
- Team Coaching

## DETAILED DESCRIPTIONS

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The next section of the catalogue offers detailed descriptions of each offering, to facilitate understanding of the opportunity, and the scope of the engagement. Listed below are short descriptions of each element of the service offering.

### **Title**

The title of the offering, including the category it belongs to

### **Description**

Brief synopsis of the service

### **Scope**

Length of a session or overall timeline to complete the service

### **Preferred audience**

Suggested audience and situation where the service would be most useful and contribute most effectively to achieved outcomes

### **Service providers**

Listing of qualified staff and consultants to provide the service. Geographical connections as well as francophone expertise listed whenever applicable.

### **Contact information**

Contact information to initiate the service request

## SERVICE REFERENCE CHART

This chart outlines the current services, the team members available to provide them and if the services are currently offered in French.

SERVICE	JIM GIBBONS	TERRY GUNDERSON	TASH TAYLOR	AVAILABLE IN FRENCH
Board self-evaluations	•	•	•	•
CEO/Superintendent evaluations	•	•	•	•
Employee engagement surveys	•	•	•	•
Executive recruitment	•	•		
Facilitation			•	•
Governance review			•	•
Organizational culture audits			•	
Organizational reviews			•	•
Planning and leadership retreats			•	•
Policy and Administrative Procedure review and development	•	•	•	•
Stakeholder mapping and analysis			•	•
Strategic Planning	•	•	•	
Survey administration and analysis			•	•
Audit Committee best Practices			•	
Being heard, not just listened to	•	•		
Better meetings, better results			•	•
Beyond Governance Basics		•		
Board orientation	•	•		
Boosting Group Performance: Team/Board Culture Analysis			•	•
Five Behaviours of a Cohesive Team	•			
Governance at your best		•		
Great Leaders, Great Teams, Great results	•			
Harnessing Constructive Conflict: Board conflict modes + analysis			•	•
Stakeholder engagement + dealing with opposition			•	•
Stephen Covey's Seven Habits of Highly Effective People	•			
Strengthening the Board – Superintendent partnership		•		
Working Better Together – Team Composition Analysis			•	•
Group Coaching			•	•
Personal Leadership Coaching			•	•
Team Coaching			•	•

# PROFESSIONAL SERVICES OFFERINGS



# EMPLOYEE ENGAGEMENT SURVEYS

Title	<b>Employee Engagement Survey</b>
Description	<p>Research indicates that if employees are engaged with the organization their job satisfaction levels increase. Employees that are engaged and personally satisfied are very invested in the success of the organization and have a high level of commitment and loyalty.</p> <p>The primary reason for issuing engagement surveys is to measure the engagement level of your employees. Measuring the key drivers of engagement within your organization will allow you to assess the degree to which employees are engaged or disengaged. Some standard drivers of engagement and some commonly assessed factors are: advancement, recognition, pay &amp; benefits, job role, training &amp; development opportunities, leadership, and recognition methods.</p>
Scope	<p>This is a comprehensive initiative taking approximately 16 weeks to complete; however, this is highly dependent on the nature of the engagement and the board's desired process.</p> <p>The Board will receive a detailed report and presentation with highlights and recommendations.</p>
Preferred audience	All boards
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# EXECUTIVE SEARCHES

Title	<b>Executive Recruitment</b>
Description	<p>The Association offers comprehensive executive search services for member boards. These recruitment services include the joint customizing of the search plan and process to meet the needs of individual boards.</p> <p>The selection processes completed are uniquely and intentionally designed to yield positive results in the most important decision a board will make. All applicable legislation is reviewed.</p> <p>Subsequent to an advertising campaign of two to three weeks, a short listing meeting is scheduled.</p> <p>Similar processes can be designed for Secretary-Treasurer and Associate/Assistant Superintendent competitions.</p> <p>Ministerial approval required only for Superintendent</p>
Scope	Overall timeframe – 2 to 3 months
Preferred audience	All boards
Service providers	Jim Gibbons, Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



## FACILITATION

Title	<b>Facilitation</b>
Description	<p>Skilled, third-party facilitation to manage and guide your meeting or event, so you don't have to; allowing you to fully engage and focus on the dialogue.</p> <p>Facilitation is useful for both small group and large groups, such as focus groups, stakeholder feedback sessions, and large employee meetings dealing with a specific topic. Pre-meeting interviews are conducted with the organizers, and written comment forms are incorporated for participants. A survey component can also be incorporated. A final summary report is provided to you with some analysis.</p> <p>Public participation and community engagement facilitation is also available for challenging and difficult topics, where a high degree of emotion may be present. These sessions would be further analyzed to understand the desired outcomes and plans, and facilitated using the IAP2 framework.</p> <p>See Team and Group Coaching as well page XXX</p>
Scope	The time required based on request
Preferred audience	School boards, teams
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



## GOVERNANCE REVIEWS

Title	<b>Governance Review</b>
Description	<p>The Governance Review service provides boards with an analysis of their key governance practices with the purpose of identifying ways that can pinpoint strengths and opportunities for professional development, leading to stronger board performance and greater competence.</p> <p>The service is diagnostic in nature offers examination of governance structures or processes that are effective, and identification of those that need to be addressed; with recognition that effective governance requires a heightened level of intentionality; and clarity about the importance of a transparent relationship between the board, trustees, and the superintendent, that is inclusive of mutual expectations and accountability.</p> <p>Precipitating events or conditions that may indicate a need for the service include:</p> <ul style="list-style-type: none"> <li>• The beginning of a new term in office to review current governance practices to examine opportunities and risks</li> <li>• Board disruptions, or governance or organizational shortcoming that impacts reputation, relationships and cohesive performance ;</li> <li>• Existence of a board culture that some believe lacks integrity or engagement</li> <li>• The need to help address a pattern of conflict or dysfunction</li> </ul>
Scope	<p>This is a comprehensive initiative taking approximately 12 weeks to complete.</p> <p>The Board will receive a detailed report and presentation with highlights and recommendations.</p>
Preferred audience	Board of Trustees
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# PLANNING AND LEADERSHIP RETREATS

Title	<b>Planning and Leadership Retreats</b>
Description	<p>Working in the organization takes most of our time, yet it's imperative for leaders to set aside time to work "on" the organization.</p> <p>A leadership and planning retreat allows time for this purpose. It is space created outside the day-to-day operation to review strategic plans and results, have honest conversations and work through any topics that have emerged as important over the course of the year.</p> <p>No matter what the purpose for the retreat, everyone must understand that the retreat is not an end in itself. It is simply one step among many in a continuing process to establish or sustain an effective organization or team.</p> <p>ASBA's skillful facilitation will work closely with you to set an agenda and incorporate various elements needed to provide an intense, but enjoyable days working on the organization.</p>
Scope	<p>Planning retreats are best suited as a multi-day event to allow for adequate time for strategic and generative discussion, reviewing key information, and incorporating team strengthening professional development. Retreats are best suited at a time in well in advance of the budgeting process as the review of the strategic plan and generative discussions may have require resource alignment.</p>
Preferred audience	<b>School boards, senior leadership leaders</b>
Service providers	<b>Tash Taylor</b>
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# ORGANIZATIONAL ASSESSMENTS

Title	<b>Organizational reviews</b>
Description	<p>The purpose of organizational review is to enhance organizational success through the acquisition of objective insight and intelligence about the organization.</p> <p>An organizational review can consist of a holistic approach to analyzing the organization's functions, employee structure, operating processes or a combination of these. Organizational review is the process to collect, organize, analyze, interpret, and share relevant information to catalyze the strengthening of the organization.</p> <p>There are 3 main purposes for organizational reviews:</p> <p><b><i>Strategic, Foundational, Improvement</i></b></p>
Scope	Between 2 and 3 weeks
Preferred audience:	School boards
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



## ORGANIZATIONAL CULTURE AUDIT

Title	<b>Organizational Culture Audit</b>
Description	<p>Organizational culture is the foundation to successful strategy implementation, and is the driving force behind if and how results are achieved.</p> <p>A culture audit is a detailed examination of an organization's cultural characteristics pertaining to the work environment and the extent to which its norms, values, and unwritten behaviours hinder or support a healthy and productive workplace. The culture audit is the tool to use to get at the substance of an organization's culture so that the organization understands where and how to drive toward the preferred future.</p> <p>The organizational culture audit determines the overall working environment, identifies the unwritten norms and rules governing employee interactions and workplace practices, highlights possible barriers to effective work practices and communication and makes recommendations for addressing problems identified.</p>
Scope	<p>This is a comprehensive initiative taking approximately 16 weeks to complete; however, this is highly dependent on the nature of the engagement and the board's desired process.</p> <p>The Board will receive a detailed report and presentation with highlights and recommendations.</p>
Preferred audience	Boards of trustees and management
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# PERFORMANCE ASSESSMENTS

Title	<b>Board self-evaluations</b>
Description	<p>An effective board is accountable for its own performance. The basis for the board's self-evaluation is its job description, outlined in a policy entitled or related to the <i>Role of the Board</i>. In addition to assessing the board's effectiveness in carrying out its core governance functions, self-evaluation also includes examining how well the board works together and how effective the group dynamics are.</p> <p>Evaluations are designed to provide for both accountability and growth.</p>
Scope	1-day
Preferred audience	All boards
Service providers	Education Services Team
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# PERFORMANCE ASSESSMENTS

Title	<b>CEO/Superintendent evaluations</b>
Description	<p>As Chief Executive Officer of the board and Chief Education Officer of the jurisdiction, the superintendent provides leadership for growth in student learning and well-being as well as leadership in the growth and success of the organization. The superintendent has leadership responsibilities for implementing the board's three year education plan and for developing and maintaining an effective organization with programs and services that operationalize the board's policies. The superintendent's evaluation process will focus on the effective strategies and leadership practices the superintendent has employed to implement the board's three year education plan.</p> <p>The evaluation process is designed to accomplish the following objectives:</p> <ul style="list-style-type: none"> <li>• Ensure accountability for the effective leadership and management of the school system; and</li> <li>• Provide the superintendent with concrete feedback from the board on his/her performance to be used as a basis for his/her personal development in the role.</li> </ul>
Scope	1-day
Preferred audience	All boards
Service providers	Jim Gibbons, Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# POLICY AND PROCEDURE REVIEW AND DEVELOPMENT

Title	<b>Policy and Administrative Procedure Review and Development</b>
Description	<p>Boards create policies and policy handbooks in order to ensure that their collective will is carried out within the parameters set out in the School Act and in provincial as well as federal legislation.</p> <p>The ASBA Education Services team provides support and guidance in developing and reviewing Board policies based on a specifically developed model of reference, allowing for a great deal of customization to the individual Board's needs.</p>
Scope	Overall timeline – 2 to 3 months
Preferred audience	All boards
Service providers	Education Services team
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL SERVICES OFFERINGS



# PUBLIC AND STAKEHOLDER ENGAGEMENT

## Title **Stakeholder mapping and analysis**

**Description** Understanding who your key stakeholders are, how to motivate them, and what analyzing what they need is foundational to successful relationship building and effective advocacy.

This highly engaging workshop allows for a deep-dive review and development of your stakeholder map. A stakeholder map can be effective in analyzing opportunities and identifying new ways to approach stakeholders and overcome hurdles.

**Scope** 1 day onsite with a final report prepared and provided

**Preferred audience** School boards and senior leadership

**Service providers** Tash Taylor

**Contact information** [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL SERVICES OFFERINGS



# PUBLIC AND STAKEHOLDER ENGAGEMENT

Title	<b>Survey administration and analysis</b>
Description	<p>ASBA can assist with stakeholder or community survey preparation, deployment and results analysis.</p> <p>Surveys are often used to gather feedback and input on specific topics to help inform directions and decisions. This may include policy feedback, internal staff feedback on a matter, parent surveys, etc.</p> <p>Additional focus groups or interviews may be incorporated.</p>
Scope Timeline	Will vary depending on each situation
Preferred audience	School boards
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

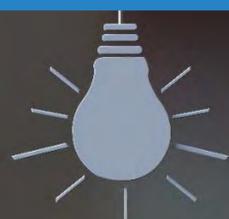
# PROFESSIONAL SERVICES OFFERINGS



## STRATEGIC PLANNING

Title	<b>Strategic Planning</b>
Description	Strategic planning is a collaborative process by which a jurisdiction determined its optimal future. Strategic planning involves understanding the entire context, determining the board's strategic directions and goals, allocating necessary resources and monitoring progress towards the realization of the board's mission and vision. It is a very important leadership role for the board.
Scope	<p>Long term strategic plan (10 years) – 1 or 2 full days</p> <p>Three Year Education Plan articulated with Alberta Educations' Business Plan – 1 or 2 full days</p> <p>Review of Mission, Vision, Values – 1 or 2 full days</p> <p>Strategic Planning with Diminishing Resources – ½ day or full day</p>
Preferred audience	All boards
Service providers	Education Services Team
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



## TRAINING DEVELOPMENT

### ADVOCACY

Title	<b>Being heard, not just listened to</b>
Description	Ways to strengthen your advocacy efforts and build champions (may include 5 c's in coalition building, top 10 advocacy steps, issue identification, etc.)
Scope	Full-day workshop
Preferred audience	Beginner trustees; Trustees
Service providers	Jim Gibbons, Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title	<b>Audit Committee Best Practices</b>
Description	This highly interactive workshop will be of benefit to new audit committee members and those who wish to better understand the role of audit committee. Participants will review the role and responsibilities of the Audit Committee as part of the governance and assurance systems; review and consider the essential features of effective audit committees; examine best practices; examine features to be aware of and questions to ask, review common areas of uncertainty, and gain a greater understanding of the legal, regulatory and professional obligations.
Scope	5 hours.
Preferred audience	Board members, audit committee, senior leadership team
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

## Title **Better Meetings - Better Results**

**Description** Trustees spend a great deal of time in meetings with the intention of making good decisions in the interest of students and the public. Investing a few hours to improve these meetings and heighten overall organizational effectiveness is, in a real sense, a community benefit.

Groups that consistently hold effective meetings do so by paying attention to their actions, being mindful of the group’s dynamics and roles, and consistently following a few general ground rules for good meetings. In this workshop you’ll learn the distinct characteristics that contribute to effective meetings, and ways to overcome the pitfalls that foster slow progress, create frustration, and create doubt among participants and observers.

**Scope** Full-day workshop

**Preferred audience** School boards

**Service providers** Tash Taylor

**Contact information** [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title	<b>Beyond Governance Basics</b>
Description	<p>This workshop is designed to refresh board members and/or senior executives with current best practices in board governance and builds on Board orientation and general governance foundations. The session is customized to individual organizations who have had some governance experience. The workshop also includes practical opportunities to reinforce key concepts and reflect on the current practices of the board. Includes top issues and how to prevent, ethical case studies, and discussion related to educational achievement from the macro-level view. Topic of the session may include:</p> <ul style="list-style-type: none"> <li>• Roles of the board, committees, management and staff</li> <li>• Review qualities of an effective board</li> <li>• Individual board member responsibilities</li> <li>• Evaluating your Board’s effectiveness</li> <li>• Liabilities, accountability and minimizing the risk</li> <li>• Fiduciary duties</li> <li>• Review common problems and ways to address</li> <li>• Rules of decision making</li> <li>• Prevention checklist for boards and trustees</li> </ul>
Scope	1-day
Preferred audience	Boards with returning trustees at beginning of new term
Service providers	Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title	<b>Board orientation</b>
Description	<p>This workshop provides brand new Boards with the foundational background to do their work at the beginning of a new term. The essence of trust and teamwork is reviewed, and the process for team development is examined. There is a focus on the Board’s policies, which outline how it is to function; the role of the Board and how it will evaluate itself is considered; the role of the trustee together with the code of conduct and sanctions is highlighted. Other roles are reviewed: the Board Chair, Vice Chair, Committees, and Representatives. The role of the Superintendent in relation to the Board’s role is carefully explored; the evaluation process is outlined. Emerging modes of governance and traits of leadership are also studied. Often a Board legacy statement is developed, and individual commitments are made.</p> <p>In the full-day and two-day sessions, a thinking styles assessment using OneSmartWorld materials is included. This activity leads to discussions about individual differences and how they can support the team concept. The concept of “Smarter Meetings” is also included.</p>
Scope	½ day; full day; two day
Preferred audience	Board with newly elected trustees (at beginning of term)
Service providers	Jim Gibbons, Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title **Boosting Group Performance : Team/Board culture analysis**

Description

The value of a high-performing team has long been recognized, yet research has shown that only 12% of teams are actually performing up to their potential. This workshop offers a constructive and focused opportunity to measure your group’s condition and readiness for strategic action, and look at ways to improve performance, and sustain positive results.

Using the Team Diagnostic™ instrument<sup>1</sup> as a platform, the team will examine its characteristics within the 2 primary domains of team performance, and 14 key indicators of team health and effectiveness.

The Team Diagnostic™ is an advanced approach to working with teams because it regards the team as a dynamic system. The system of a team exists as a culture with written and unwritten rules, expectations, beliefs, values, approved behavior and taboos. As such, team culture greatly influences and impacts team effectiveness, efficacy and organizational outcomes.

Scope

There are four program options available:

- Team Diagnostic
- Team Leader view
- Departmental/work unit 360
- Organizational 360

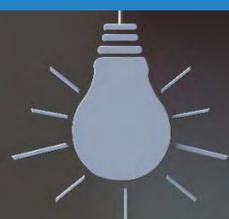
The Team Diagnostic is the most popular session and involves a half day introductory session, with a full day team debrief several weeks later. This workshop is often useful incorporated into a leadership retreat.

Preferred audience Boards who have been together at least 8 months

Service providers Tash Taylor

Contact information [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



## TRAINING DEVELOPMENT

# GOVERNANCE MATTERS

Title	<b>Governance At Your Best</b>
Description	Intended as a Part III from Board Orientation or subsequent to Beyond Governance Basics workshop.
Scope	1-day
Preferred audience	Established boards
Service providers	Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title **Harnessing Constructive Conflict:**  
Conflict styles and team/Board analysis

Description

Without conflict there would be no progress, yet that same force can be highly damaging. Through guided discussion and activities, *workshop* participants will learn ways in which they can harness conflicting situations and make it a tool for improvement rather than destruction.

In this workshop, you and your team will examine your team’s conflict style, and be provided with practical tools for improving your group's conflict-handling behavior. The Constructive Conflict Workshop will build awareness of team members’ individual modes and the team predispositions, team can employ practical conflict management tools that will help build and maintain constructive team performance.

As you become more aware of the five alternative modes for handling conflict and learn how to make effective use of each mode, you will surely achieve greater effectiveness. You will also learn about the eight key attributes of a conflict situation that signal when one mode will likely work better than other in resolving differences.

Scope 1-day

Preferred audience All boards

Service providers Tash Taylor

Contact information [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title	<b>Policy Principles (Policy support)</b>
Description	This highly interactive half-day event will be of benefit to new audit committee members and those who wish to better understand the role of audit committee. Participants will review the role and responsibilities of the Audit Committee as part of the governance and assurance systems; review and consider the essential features of effective audit committees; examine best practices; examine features to be aware of and questions to ask, review common areas of uncertainty, and gain a greater understanding of the legal, regulatory and professional obligations.
Scope	1-day
Preferred audience	New audit committee members
Service providers	Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# GOVERNANCE MATTERS

Title **Strengthening the Board -  
Superintendent partnership  
(Board/Superintendent relations)**

Description The Board and Superintendent relationship is among the most crucial to high performing Districts. To achieve the greatest results, Trustees, the Superintendent, and the senior leadership team to have a shared understanding of roles, needs, and perspectives to achieve desired results. The workshop aims to clarify needs, strengthen rapport, open communication, clarify areas of uncertainty, and enhance trust.

This workshop is a full-day, and Boards have the option to hold this session with the Superintendent (and senior leadership), or without. Each workshop will be tailored to suit each District as needed.

Scope	1-day
Preferred audience	All boards
Service providers	Terry Gunderson
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

# PROFESSIONAL DEVELOPMENT OFFERINGS



# PUBLIC ENGAGEMENT

## Title Stakeholder engagement and dealing with opposition

**Description** This workshop will provide an overview of the purpose of public participation, the principles and the spectrum of public participation. The workshop will cover when to engage the public, and what type of engagements methods are most suitable for certain circumstances, with the benefits and drawbacks. The two-day session will offers strategies and communication planning principles as it pertains to dealing with opposition, outrage, and reputational risks.

The information is based on the standards and principles outlined by the International Association for Public Participation (IAP2) and ISO 31000 - Risk Management.

**Scope** 1 day or 2 day session

**Preferred audience** School boards and staff of all levels

**Service providers** Tash Taylor

**Contact information** [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



# TEAM/GROUP EFFECTIVENESS

## Title **Five Behaviors of a Cohesive Team**

**Description** The Five Behaviors of a Cohesive Team is an assessment-based learning experience that helps people discover what it takes to build a high performing team. This is an advanced team building course designed for already established teams who are ready to take team work to the next level. It is an engaging, informative and fun learning experience.

The Team Model is founded on vulnerability-based trust, allows team members to engage in conflict around ideas, enhances commitment to decisions, permits team members to hold one another accountable and focuses on achieving collective results.

**Scope** 3-half day sessions

**Preferred audience** All boards

**Service providers** Terry Gunderson

**Contact information** [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



# TEAM/GROUP EFFECTIVENESS

## Title **Great Leaders, Great Teams, Great Results**

**Description**

School boards, by the nature of their mandate from government, must exhibit leadership in their roles as governors.

This one day focuses on getting superior results through team leadership and will help leaders learn how to:

- Build trust and influence with others.
- Define their team’s purpose and their “job to be done”.
- Create a strategic link between the work of the team and the goals of the organization.
- Connect the work of the team to the organization’s mission and mandate.
- Align the four essential systems of clarifying purpose, aligning systems, unleashing talent and inspiring trust.

**Scope** 1-day

**Preferred audience** All boards

**Service providers** Jim Gibbons

**Contact information** [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



# TEAM/GROUP EFFECTIVENESS

Title **Stephen Covey's Seven Habits of Highly Effective People**

Description Does your Board possess the right habits?  
Habits are powerful forces in our lives. They determine our level of effectiveness and ineffectiveness. The purpose of *The 7 Habits of Highly Effective People* is to help you lead your life in a truly effective way. They represent a proven process of personal and interpersonal growth that can have an immediate and lasting impact.  
Based on his all-time best-selling book on leadership of the same name, this one to two day workshop will focus participants on their leadership journey toward internalizing the 7 Habits.

Scope 1-day workshop

Preferred audience All boards

Service providers Jim Gibbons

Contact information [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# PROFESSIONAL DEVELOPMENT OFFERINGS



# TEAM/GROUP EFFECTIVENESS

Title	<b>Working Better Together: comprehensive team composition analysis</b>
Description	<p>Too often, organizations focus merely on the functional role and hope that good team performance somehow follows. This is why even the most expensive professional sports teams often fail to perform.</p> <p>Anything of value happens as the result of team effort, thus evaluating the whole person can offer pivotal insights into how people are likely to work together, and can help flag areas of conflict and affinity.</p> <p>Using a variety of instruments and approaches, this customized workshop aims to improve your Board’s performance at any stage.</p> <p>For high-functioning Boards, the workshop is tailored to build upon strengths for maintaining cohesion and moving toward even greater impact. For Boards in difficulty, a professionally facilitated discussion will enable the Board to constructively address any areas of concern to improve cohesion, communication, trust, or other aspects pertaining to board cohesion.</p>
Scope	An preliminary session of 2 hours is provided, followed with a 1.5 day session several weeks later. This workshop can be incorporated into a multi-day retreat.
Preferred audience	Boards / teams who have worked together for 1 year.
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

## LEADERSHIP SERVICES



### COACHING

## GROUP COACHING

Title **Group Coaching**

Description Group coaching facilitates an understanding of perspectives, identifies leverage points and incompatibilities, and seeks possible points of cooperation among participants. Outcomes of the day will be discussed in advance with the host organization, and clarified at the beginning of each session, with an aim to move to establishing next steps or resolutions.

Scope A typical session is 2 – 2.5 hours. However, depending on the circumstance, the complexity of the matter, and the desired outcomes, multiple sessions may be required.

Preferred audience Group coaching is often useful when various stakeholders with distinctive interests are brought together around a common topic, but not necessarily with common purposes or shared goals.

Service providers Tash Taylor

Contact information [reception@asba.ab.ca](mailto:reception@asba.ab.ca)

# LEADERSHIP SERVICES



# LEADERSHIP COACHING

Title	<b>Personal Leadership Coaching</b>
Description	<p>Working with a qualified practitioner, individuals have a confidential and professional resource to consult on individual work performance and leadership effectiveness.</p> <p>Personal leadership coaching is an advanced professional development process often useful for having safe space to talk something through in complete confidence, to resolve work challenges with a thinking partner, prepare for challenging events, or develop personalized action plans.</p> <p>Leadership coaching is also key to improving and refining specific skills such as communication, influence, presence, conflict management, team building, persuasion. Coaches are able to facilitate deeper learnings about yourself, how you're perceived, where you can improve to achieve your goals and maximize your potential.</p>
Scope	Generally, a session is on an hourly basis. Delivery can be on the phone, via Skype or in person, when permitting.
Preferred audience	All individuals of all backgrounds. Executive coaching is also available for those in senior management roles.
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>



Title	<b>Team Coaching</b>
Description	<p>Team coaching is often useful when team members are brought together around a common goal or unclear goals, and could benefit from a third-party facilitator to assist in working through situations to desired results.</p> <p>Team coaching can help team members through a specific challenge, or refocus when something new, or uncertain surfaces in the operating environment and constructive conversation is needed.</p> <p>Team coaching is also useful when there exists positive team dynamics, but facing complex issues and competing priorities. A team coach can facilitate in working through to clarity and desired outcomes.</p>
Scope	<p>A typical session is 2 – 2.5 hours. However, depending on the circumstance, the complexity of the matter, and the desired outcomes, multiple sessions may be required.</p> <p>Outcomes of the day will be discussed in advance and clarified at the beginning of each session, with an aim to move to next steps or resolutions.</p>
Preferred audience	Teams and people who work together as part of the organizational system.
Service providers	Tash Taylor
Contact information	<a href="mailto:reception@asba.ab.ca">reception@asba.ab.ca</a>

## Engagement Letters and PIPA Form

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All services listed in this catalogue and its subsequent versions, will be completed upon submission of an Engagement Letter. Services that require the collection of personal information will also require the submission of a signed copy of a PIPA release form, to ensure the understanding of processes ASBA will follow in accordance with PIPA legislation.

### **Engagement Letter**

The Engagement Letter will constitute in writing the terms of reference for an assignment. The Engagement Letter will confirm:

- Assignment objectives.
- Steps, milestones, and deliverables in the proposed work plan.
- Timeline of steps, milestones, deliverables, and completion date.
- Names, relevant qualifications, and role of each consultant proposed.
- Fees.
- Billing arrangements, including how all expenses, disbursements, and applicable taxes will be handled.

### **PIPA Release Form**

Whenever the collection of individual personal information will be required, ASBA will ensure to clarify how it follows legislation as per the PIPA Act.

Sample of letter and form are included in the following pages.

## Sample Engagement Letter

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SCHOOL BOARD ENGAGEMENT LETTER

[Date]

Confidential

[School Board name and address]

Attention:

Dear Sir/Madam:

Re: Engagement Letter

This letter confirms you have hired ASBA to provide services as described below to [School board name]. It is understood that this arrangement will require ASBA to retain an independent contractor, and/or the ASBA School Boards Advisor namely \_\_\_\_\_, (the "Consultant") to deliver the services. Those services are as follows:

1. Name of service [as per ASBA Education Services Catalogue]

\_\_\_\_\_

2. Within the following timeline [indicate timeline]

\_\_\_\_\_

This confirms that you agree to proceed on this basis and pay the normal published hourly ASBA rate of two hundred and fifty dollars (\$250.00)/hour to complete the require service to your board. The expected overall scope of time required to complete this work ranges between: [add minimum and maximum range of hours]. Please note, in accordance with ASBA policy, you will not be charged for travel time or expenses associated with the delivery of the services.

The key deliverables/scope of the service required include:

[List here agreed upon milestones/deliverables/timing of session as per ASBA Education Services Catalogue]

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

The total estimated cost for the services is \_\_\_\_\_ DOLLARS (\$\_\_\_\_\_). This is an estimate only as the cost may vary depending on a variety of factors.

The Consultant, on behalf of ASBA, will strive to maintain open communications and regular updates on the services requested.

Please execute and return this letter to the undersigned to enable us to commence providing these services to your board. We appreciate the opportunity to be of service to your school board.

Yours sincerely,

Valeria Palladino  
Chief Officer Learning and Research Services  
Alberta School Boards Association

On behalf of [School Board Name], I am authorized to accept the terms herein and authorize ASBA to proceed as set out above.

Date:

Name: \_\_\_\_\_  
CC: [Contractor/Advisor name]

Signature: \_\_\_\_\_

## Sample PIPA Release Form

### Personal Information Protection Act (PIPA) & Alberta School Boards Association (ASBA) Release Form

The Alberta School Boards Association (ASBA) is committed to ensuring the protection of our members' and clients' personal information in accordance to Alberta's *Personal Information Protection Act* (PIPA), other relevant laws, and the ASBA Privacy Policy. Your personal information will be collected, used, and disclosed only for the purpose of delivering the requested service, product, or program.

Your personal information will be securely retained for the duration of your use of the service, and for (1) year following the completion of the service or program. You may request, via written correspondence, to withdraw your consent as per the ASBA Privacy Policy. The choice to provide personal information is always yours, however this may limit the quality and ability for ASBA to provide some services.

By checking and signing the following you are acknowledging that you understand:

ASBA will protect your personal information in accordance to PIPA and ASBA Privacy Policy.

Your information will be collected, used, or disclosed for the purposes to deliver your requested service, product, or program, as identified on this Form.

You may withdraw your consent at any time by contacting the appropriate person at the end of this form.

Withdrawing your consent will limit the ability or quality of services ASBA can provide you.

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

Signature \_\_\_\_\_

Date \_\_\_\_\_

#### Purpose of Collection, Use and Disclosure of Personal Information

I consent: [initial boxes]	Type of Personal Information to be Used, Collected and Disclosed and Purpose of Use, Collection and Disclosure by the ASBA
	My name, telephone number, email, and/or mailing address may be used to open and manage an ASBA account, deliver requested products and/or services, and enroll/register and communicate about requested programs.
	My name, telephone number, email, and/or mailing address may be used to send communications about ASBA products, services, activities, interests, events, appointments, meetings and projects which may be communicated by phone, email, newsletter, or mail-out.
	My name, telephone number, email, and/or mailing address may be used by ASBA to solicit information about ASBA programs and services including communications and surveys to determine satisfaction with current products and service and to evaluate the desire for future projects/programs which may be solicited by phone, email, survey or mail-out.
	My name and/or image may be used by ASBA in ASBA newsletters, advertising, websites and other social media platforms to highlight and profile members and/or clients and their accomplishments and to highlight attendance information at ASBA events and seminars.
	My name and business contact information, including business name, phone number, email, website and address, may be published to [clarify purpose].
	My name, telephone number, email, mailing address and/or image may be used to prepare historical and/or archival materials to be used for [clarify purpose].

## Sample PIPA RELEASE FORM

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*The PIPA Act may be viewed: <http://www.qp.alberta.ca/documents/Acts/P06P5.pdf>*

*The ASBA Privacy Policy may be viewed: <http://www.asba.ab.ca/privacy-policy/>*

*The ASBA is responsible for personal information under its control. Any questions about ASBA privacy practices, to access your information, or to make any corrections please contact the Chief Officer, Learning & Research, Valeria Palladino at [vpalladino@asba.ab.ca](mailto:vpalladino@asba.ab.ca).*

### **ASBA Privacy Policy**

The full ASBA Privacy Policy can be found at: <http://www.asba.ab.ca/privacy-policy/>

### **Why the ASBA collects personal information?**

The ASBA collects only the personal information that it needs for the purposes of providing services to its members, including personal information needed to:

open and manage an account

deliver requested products and services

enroll/register members in a program

contact members about appointments, meetings, and projects

follow up with members to determine satisfaction with products and services which

may also include conducting surveys

conduct surveys to evaluate the desire for future projects/programs

managing our relationship with members

notify members of upcoming events of interest

meet legislative requirements

prepare historical/archival materials

publish photographs of ASBA and ASBA-sponsored events

circulate attendance information at ASBA events and seminars

highlight and profile members and member accomplishments

publish member business contact information

such other purposes consistent with the foregoing purposes

### **Limiting the collection of personal information**

The ASBA collects only the personal information that it needs to fulfill the purposes it has identified. The ASBA normally collects personal information directly from its members, but it may collect information from other persons with your consent or as authorized by law.

### **How does the ASBA safeguard personal information?**

The ASBA will protect personal information by security safeguards appropriate to the sensitivity of the information. The ASBA will not sell, rent or give away your personal information. The ASBA does contract with certain service providers approved by the ASBA and all suppliers are bound by strict contractual obligations designed to protect the privacy of your personal information. ASBA employees are informed of the importance of protecting your privacy. Employees are expected to maintain the confidentiality of ASBA member information at all times.

With respect to personal information stored electronically, access to such information is password protected and in some cases, accessed only through biometrical security measures. With respect to personal information stored on a hard copy, the ASBA stores such information in its office for use by its staff for the purposes noted above. Archival material is secured under locked storage.

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