

Leadership in Business Education

NBEA National
Business
Education
Association

Leadership in Business Education

Leadership in business education is critical if the profession is to move forward in our fast-paced global society. This handbook is designed to provide assistance in developing leaders for NBEA, regional, and state/territory/province associations who will strengthen business education.

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SECTION I:

LEADERSHIP DEVELOPMENT

PURPOSE: "Leadership is the ability to get people to do what you want them to do, when you want it done, in a way you want it done, because they want to do it."

DWIGHT D. EISENHOWER

Suggested time frame: 30 minutes to 1 hour

1. LEADERSHIP STYLES

a. Identify desirable leadership traits, characteristics, and attributes

- Physical
- Intellectual
- Personal
- Ethical

Max DePree, *Leadership Is An Art*, identifies characteristics and traits of future leaders. Has consistent and dependable integrity

- Cherishes heterogeneity and diversity
- Searches out competence
- Is open to contrary opinion
- Communicates easily at all levels
- Understands the concept of equity and consistently advocates it
- Leads through serving
- Is vulnerable to the skills and talents of others
- Is intimate with the organization and its work
- Is able to see the broad picture (beyond his/her own area of focus)
- Is a spokesperson and diplomat
- Can be a tribal storyteller (an important way of transmitting our corporate culture). Tells "why" rather than "how"

In addition, future leaders must be risk takers.

b. Differentiate between leading and managing styles

2. DEVELOPMENT OF POTENTIAL LEADERS

a. Identify and actively recruit diverse populations

- Cultural
- Race
- Gender
- Disabilities
- Educational level (e.g., Elementary, Middle School, Secondary, Postsecondary, and Higher Education).
- Geographic regions
- Types of institutions: Public, private, and parochial.

b. Review types of involvement available

- c. Encourage active participation
 - Committees
 - Coordinators/liaisons
 - Speakers
- d. Seek volunteers - evaluations
 - Select potential leaders-follow through with further committee assignments and additional leadership activities
- e. Encourage professional development through
 - Role modeling
 - Mentoring
 - Sharing responsibilities
 - Reflection
 - Observation
 - Read biographies of leaders
 - Participate in formal leadership training
- f. Follow up/evaluate/recognize membership satisfaction

3. TEAM BUILDING

- a. A team consists of two or more people working together toward a common goal
- b. Team building creates a positive, friendly climate and a spirit of cooperation among people who will be working together. Further, team building creates opportunities for member interaction.
- c. Examine different kinds of teams
 - Formal teams
 - Informal teams
- d. Identify characteristics of effective and ineffective teams
- e. Determine roles of team members
- f. Consider problems of teams
- g. Build consensus among team members
- h. Manage conflict
- i. Become a leader who cares and makes a difference

ACTIVITIES

1. Participants develop a list of effective leadership qualities.
2. Participants develop a list of ineffective leadership qualities.
3. Participants discuss their leadership qualities.
4. Ice breakers, team building activities, and leadership materials in appendices.

SECTION II: COMMUNICATIONS

PURPOSE: To exchange information effectively in order to accomplish the specific objectives: "I know you believe that you understand what you think I said, but I am not sure that you realize that what you heard is not what I meant."

AUTHOR UNKNOWN

Suggested time frame: 30 minutes

1. TYPES OF COMMUNICATIONS

- a. Use verbal skills effectively
- b. Understand non-verbal communications
- c. Make effective use of written communications
- d. Use listening skills

2. METHODS OF COMMUNICATIONS

- a. Use telecommunications effectively
- b. Make formal presentations
- c. Make informal presentations

3. COMMUNICATION STYLES

Identify characteristics for the following styles.

- Amiable
- Analytical
- Driver
- Expressive

4. PRINCIPLES OF EFFECTIVE COMMUNICATIONS

- a. Clarify ideas
- b. Examine real purpose
- c. Consider total setting (social, physical, and cultural)
- d. Be aware of cultural and geographical differences
- e. Consult with others in planning
- f. Recognize non-verbal communication
- g. Follow up
- h. Communicate for the future
- i. Support communication with actions
- j. Be a good listener

5. DIFFERENT COMMUNICATION SITUATIONS

- a. Deliver speech introductions
- b. Deliver formal presentations
- c. Bring greetings
- d. Make impromptu remarks

6. MAXIMIZE COMMUNICATIONS EFFORTS

- a. Be familiar with related organizations
- b. Develop networks
- c. Build coalitions
- d. Expand professional contacts beyond local area
- e. Participate in electronic bulletin boards and conferences
- f. Seek and promote opportunities for international communications

ACTIVITIES

- 1. Use ice breakers.
- 2. Work in groups to practice speech introductions.
- 3. Assign groups to identify cultural barriers.
- 4. Assign role-playing situations to demonstrate the power of non-verbal communications.
- 5. Have groups identify do's and don'ts of international and geographic communications.

SECTION III:

WRITING FOR PUBLICATION (SOFT COPY AND HARD COPY)

PURPOSE: To share information and research findings with those within as well as outside the profession.

Suggested time frame: 30 to 45 minutes

1. PUBLICATIONS

- a. Develop pamphlets and brochures
- b. Write articles for s/t/p newsletters
 - Feature members
 - Spotlight innovative programs
 - Promote association activities
 - Provide relevant articles
 - Feature NBEA and regional information
 - Provide membership information - NBEA, s/t/p and ISBE
- c. Write for regional publications (e.g., newsletters, service bulletins, and other publications)
- d. Write for s/t/p publications/journals
- e. Write for national publications
 - National Business Education Association (NBEA)
 - National Association for Business Teacher Education (NABTE)
 - International Society for Business Education (ISBE)
 - Delta Pi Epsilon (DPE)
 - Related professional journals
 - Trade publications
 - Training and development journals

2. PUBLICATION GUIDELINES

- a. Conform to scope/goals of publication (e.g., research-based, topical, position, and “how-to” articles)
- b. Include information of interest to audience (educational level and subject content)
- c. Adhere to specific publication criteria
 - Well organized
 - Grammatically correct
 - Length
 - Format
 - Deadlines

- Timely topic
 - Readability level
- d. Attend to ethical considerations
- Follow copyright laws
 - Give credit to others with appropriate documentation
 - Provide accurate information

ACTIVITIES

1. Ask participants to identify most frequently read publications.
2. Participants discuss strengths and weaknesses of these publications.
3. Participants identify what articles are needed and topics of content.
4. Participants discuss why they have or have not written for publication.
5. Hand out and review guidelines of various publications.

SECTION IV:

CONVENTION PLANNING

PURPOSE: To provide a relevant and meaningful professional development experience for members of the association.

Suggested time frame: 1 1/4 hours

1. PLANNING

- a. Review evaluations from previous convention and include suggestions where appropriate
- b. Appoint site selection committee
- c. Choose site and date in advance
- d. Determine site selection criteria
 - Locality
 - Exhibit space
 - Registration
 - Meeting space
 - Equipment and supplies
 - Guests, etc.
 - Meals
 - Budgets
 - Guest rooms and prices
 - Transportation (air and ground)
 - Miscellaneous
- e. Secure site proposals and conduct contract negotiations

2. ORGANIZATION

- a. Identify all tasks and timelines (e.g., food, registration, decorations, hospitality, exhibits)
- b. Develop guidelines for all conference committees
- c. Develop meeting planning worksheet
- d. Develop agenda
- e. Obtain sponsors

3. PERSONNEL

- a. Appoint committees and select people to serve
- b. Consider state/regional representation, diversity, and new member participation
- c. Distribute assignments and deadlines

4. BUDGET

- a. Identify income and expenses for conference
- b. Set registration fee
- c. Develop budget

5. PROGRAM DEVELOPMENT

- a. Determine conference theme and objectives
- b. Determine sessions (e.g., general, computer, workshops, breakouts, tours)
- c. Identify speakers
- d. Identify support personnel
- e. Determine room setup
- f. Determine audio-visual needs
- g. Communicate with program personnel and others
- h. Arrange for transportation, lodging, registration, etc., for speakers and VIPs
- i. Thank all personnel-exhibitors, speakers, committee chairs, sponsors, etc.

6. EXHIBITS

- a. Develop floor plans and exhibit information (to include exhibit contracts)
- b. Identify potential exhibitors
- c. Contract with drayage company
- d. Correspond with all potential exhibitors
- e. Follow up leads
- f. Arrange for security
- g. Assign space for exhibitors
- h. Identify specific times in program and activities to attract people to exhibit area

7. PUBLICITY

- a. Develop promotional piece for advertising conference well in advance of the event (including all registration information, forms, and hotel registration)
- b. Prepare participant and speaker packets
- c. Prepare press releases
- d. Secure conference photographer (if appropriate)
- e. Coordinate printing needs with all committee chairs
- f. Print program booklet

8. FOOD AND BEVERAGE

- a. Identify food and beverage functions and requirements for each
- b. Select menu and determine costs
- c. Sign agreements (including guarantees and timeliness)
- d. Ensure cost effectiveness of meal functions

9. EVALUATION

- a. Develop evaluation forms

- b. Distribute, collect, and tabulate results
- c. Generate convention report

10. REGISTRATION/HOSPITALITY/DOOR PRIZES

- a. Prepare a database of registered participants
- b. Prepare name badges, tickets, etc.
- c. Develop registration and hospitality desk work schedule
- d. Provide pertinent information about the area (e.g., restaurants, churches, attractions)
- e. Prepare hospitality packets with local items if appropriate
- f. Obtain and distribute door prizes to get participants to exhibits; to sessions promptly, and to meal functions

ACTIVITIES

1. Use case studies to help participants decide do's and don'ts of conference planning.
2. Have participants share experiences.
3. Have participants role play (contract negotiations).
4. Review registration forms and contracts to determine missing items.
5. Ask participants these questions: Why was a convention a flop? What was the best convention you have attended? Why? What was the worst convention you have attended? Why?
6. Use the following scenarios.

SCENARIOS

Sandy-Friend or Foe?

James Melton is responsible for planning a business conference program. Last year 100 people registered for the conference and the planning committee expects that many people to attend again this year. At least 90 percent of the participants were middle grades teachers. James' friend, Sandy, insists that James should plan at least 10 breakout sessions for Friday afternoon. She also advised him to have at least two sessions about teaching telecommunications at the postsecondary level. What do you think of Sandy's advice? What would you advise James to do?

I Did It My Way - As Usual!

Scott is a hard worker and has the reputation of getting things done. As a result of his reputation, he is asked to chair the regional business convention where over 800 people attend. Scott makes his list, checks it twice, and starts to work. About a month before the convention, Scott realizes that he will have to work at least 20 hours a day to get everything ready for the convention. What is Scott's problem? How could he have avoided the dilemma he now faces?

That's Your First Offer and I'm Taking It!

Barbara is asked to chair the site selection committee for Oregon's business convention. After much deliberation, the committee chooses Portland as the site. "This is going to be easy," Barbara comments to a friend. I'm going to tell the hotel personnel exactly what we will pay for meeting room rental and for each meal function. When Barbara arrives at the hotel she is warmly welcomed by the sales manager. After they exchange greetings, Barbara gives an overview of the convention, the number of meeting rooms needed, and the meal functions that will be held. She is in a hurry so she blurts out, "The most we'll pay for meeting room space is \$100 per room. I will select menus for which we will not pay more than \$15 for each meal. The sales manager says, "It's a deal." Barbara tells her husband about her deal and he cries, "Oh, no!" Why would her husband say such a thing?

Timely, Timely, Timely

The business state convention planners did an outstanding job in getting excellent speakers and tours for the annual convention. The program had a wonderful mix of sessions, fun activities, and tours. At the regularly scheduled Board meeting, the planning chair reported on the convention that was to be held one month from that date. After the report, one Board member said, "That sounds like an excellent program, but I haven't received my registration forms yet." Silence prevails. Registration forms haven't been mailed. What is next? How could this situation have been avoided?

Not One Meal More

Hattie is responsible for guaranteeing the number of people who will attend the awards luncheon. Last year 500 attended but 750 tickets have been sold for this year. About 525 tickets were sold last year. How many should Hattie guarantee? What are essential questions Hattie should ask the catering manager about guarantees?

Same Ole, Same Ole

As president of the state association, Phil has the responsibility for appointing the next year's convention committee chairs. He knows that Deborah has chaired the registration committee for the past five years. He gives her a call and she replies, "I've done that job forever. Why don't you ask someone else?" What wisdom do you see in Deborah's reply? How can a president use committee appointments as a means of "growing professionals?"

SECTION V: MEETING MANAGEMENT

PURPOSE: To accomplish association objectives through an effective, efficient, and well-organized group process.

Suggested time frame: 45 minutes

1. PLANNING

- a. Establish meeting schedule
- b. Determine objectives of the meeting
- c. Set agenda
- d. Determine type of meeting (e.g., task oriented, information giving, rap session, etc.)
- e. Notify participants well in advance of meeting
- f. Prepare and distribute materials prior to meeting
- g. Make facility arrangements

2. IMPLEMENTATION

- a. Arrange room to encourage participation (e.g., U-shaped room)
- b. Appoint a parliamentarian (if appropriate)
- c. Follow Robert's Rules of Order when conducting a meeting
- d. Begin and end meeting on time
- e. Exhibit characteristics of an effective meeting facilitator
 - Be neutral
 - Set positive tone
 - Help group solve problems
 - Limit repetitive and prolonged comments
 - Encourage participation
 - Avoid interpersonal confrontation
 - Protect group from one person's domination
 - Accept and build upon incomplete ideas
 - Keep attention focused on tasks
 - Offer process/problem-solving suggestions
 - Energize the group
 - Bring closure to discussion on agenda items
 - Summarize accomplishments and assign follow-up responsibilities
 - Establish deadlines
 - Use quality management processes for making decisions (e.g., brainstorming, cause and effect diagrams, etc.)
 - Promote team building

3. FOLLOW UP

- a. Record and distribute minutes of meeting in a timely manner
- b. Monitor progress of activities, committees, task forces, etc.
- c. Carry out directives of meeting promptly (e.g., appointing committees, sending correspondence, making telephone calls, obtaining information)

ACTIVITIES

1. Conduct and evaluate mock meetings.
2. Discuss case studies.
3. Ask questions such as, “Why did the meeting succeed?” “Why did the meeting fail?”
4. Have participants select room choices for meetings.
5. Use games people play to develop a team approach.
6. Establish groups and assign scenarios using problem-solving techniques in situations such as handling difficult people at a meeting.

SCENARIOS

I’ve Never Met a Meeting That I Liked

“Oh no,” says Maria, “I must go to a Board meeting tomorrow night. The meeting should start at 7:00 p.m., but will probably start at 7:30 p.m. and continue until midnight. If only the president would learn some time management skills. Besides, two people always dominate the conversation and the rest of us hardly have an opportunity to say anything. A few of us are at the point of telling M.A. to go sit outside in the dark. He just doesn’t know when to shut up and the president doesn’t do anything to stop his obnoxious behavior. Then there is sweet Tanya. About every 15 minutes, she asks questions that have already been answered ten minutes before. And another thing, we spend an hour talking about what color the flowers should be at the head table, and just two minutes about developing a membership recruiting plan. We never have an agenda ahead of time so we never know what we’re going to discuss. The one time we had an agenda we didn’t follow it.”

Please help this president by suggesting ways the Board meetings can be more productive. List specific ways that following parliamentary procedures can assist the president. What protocol in Robert’s Rules of Order address one person dominating the conversation or comments?

Are You For It Or Against It?

Bill is president of a regional business education association. He has many good ideas and usually considers the advantages and disadvantages of a particular action. An agenda item for the next meeting is deciding whether the association should hold its next convention at an obscure resort. When the group gets to that item, Bill immediately says that it would be a major mistake to hold the convention at this resort. Are Bill’s actions in keeping with parliamentary procedures? How can Bill help the group reach a conclusion regarding the advantages and disadvantages of its decision?

Circling the Wagon

When Evan walks into the room where the Board meeting is to be held, he notices that the room is arranged in classroom style. What are some other options for arranging a meeting room? What arrangement is the most conducive for maximum participation?

I’ve Made Up My Mind! Don’t Confuse Me With Facts!

President Sally knows that John Adams is adamant about discontinuing some of the organization’s publications. During the past two meetings, he has spent what has seemed like hours making his viewpoint

known. No one else has had a chance to present opposing views. If you were Sally, how would you make sure that all sides are considered before a vote is taken?

Doing a Balancing Act

Ellisa read in some materials from the Center for Advanced Management Education in Public Affairs, in Los Angeles, California, that you must pay attention to both process and content of meetings. What is the difference between content and process? Give examples of each. Why do you agree or disagree with the statement about content and process? Is one more important than the other?

There He Goes Again

Everytime Barry comes to a Board meeting, he eventually brings up the subject about changing the organization's name, regardless of what agenda item is being discussed. If you were president, how would you handle this situation?

Talk, Talk, Talk

Regardless of who has been recognized at the Board meeting, Dan frequently carries on a conversation with the person sitting beside him. Then a few minutes later, he makes comments that have already been made. Dan is a very nice person but doesn't seem to be aware of how disruptive his behavior is. How do you handle this situation?

What Do You Mean I Have Responsibility As a Member of the Board? I'm Not the President/Chair

There are certain skills that each member of a group should use in contributing to the accomplishment of a meeting's purpose. What are some of those skills and how do you get members to accept their responsibilities?

SECTION VI: OPERATING PROCEDURES – HANDBOOK

PURPOSE: To provide essential information about the association, its purpose, services it provides and how it operates.

Suggested Time Frame: 45 minutes to 1 hour

1. PROCEDURES MANUAL

Review/update contents

- Articles of Incorporation/Bylaws
- Purpose and program of work
- Organizational chart
- Officers, terms of office, and duties
- Agendas and minutes of meetings
- Financial data
- Standing/special committees and guidelines
- Membership data
- Personnel items
- Policies and procedures
- Conferences and meetings
- Awards program
- Newsletters/publications
- Scholarships

2. JOB DESCRIPTIONS

Comply with bylaws and program of work

- Officers
 - Geographical representation
 - Educational level representation
 - Cultural, race, and gender representation
- Committees
 - Geographical representation
 - Educational level representation
 - Cultural, race, and gender representation

3. TIMELINES

Coordinate and/or comply with timelines

- Bylaws
- Policies and procedures
- Program of work
- NBEA, regional, and s/t/p publications and correspondence
- Other professional associations and organizations

ACTIVITIES

Review sample procedures contained in association documents.

SECTION VII: MEMBERSHIP

PURPOSE: To advance the professional interests and competence of business educators through association memberships.

Suggested time frame: 1 to 1 1/2 hours

1. MEMBERSHIP DIRECTOR

- a. Meet following qualifications
 - Familiar with background/history of organization. Experience within organization
 - Knowledge of association and liaison(s)
- b. Possess qualities of an effective membership director
 - Organized
 - Assertive/aggressive
 - Creative
 - Initiative
 - Deadline oriented
 - Committed
 - Dependable
 - Detailed
 - Enthusiastic
 - Perseverance
 - Follow up on timeliness of remittances

2. MEMBERSHIP DATABASE

- a. Contact State Department of Education (State Supervisor)
- b. Contact State Vocational Director
- c. Contact community college board
- d. Send letters to all institutions
- e. Contact NABTE representatives
- f. Consider publishing company mailing lists
- g. Contact educational districts/consortiums
- h. Contact office administration personnel and training firms

3. MEMBERSHIP BENEFITS/SERVICES

- a. Enhance career growth and development
- b. Expand influence with linkages between national, regional, and s/t/p associations
 - Organizational chart

- c. Expand professional network
- d. Strengthen image of business education
- e. Receive membership benefits and services
 - Publications
 - Conferences/conventions
 - Unified voice
 - Awards program
 - Exhibits of instructional resources
 - Group travel
 - Financial planning
 - Group insurance
 - Tax sheltered annuity programs

4. MEMBERSHIP MARKETING STRATEGIES

- a. Promote mission of business education
- b. Use marketing segmentation (retention, reinstatement and recruitment)
- c. Establish a theme
- d. Determine timeline
- e. Determine methods/media
 - Mail
 - Personal contacts (e.g., meetings, conferences, etc.)
 - Publications
 - Telephone
 - Public service announcements
 - Key contact people
- f. Establish statewide membership committee
 - Geographical regional representation
 - Educational levels of representation
 - Business teacher education student representation

5. MEMBERSHIP CATEGORIES

- a. Encourage membership in NBEA, regional, and s/t/p associations
- b. Explain membership year
- c. Summarize membership eligibility
 - Individuals
 - Students
 - Organizations
- d. Focus on types of membership
 - NBEA/Regional
 - Professional
 - Professional1/ISBE
 - Student
 - Other
 - S/T/P (To be determined by presenter)

6. BUSINESS EDUCATION MARKETING STRATEGIES

- a. Promote business education through
 - Student organizations
 - National Education for Business Month and other commemorative weeks
 - Advisory committees (national, s/t/p, and local)
 - National association publications and activities
 - Regional, s/t/p, and local activities
 - Community organizations
 - Teacher awards and recognitions
 - Research activities
 - Political activism
 - News releases
 - School to work transition
 - Youth apprenticeships
- b. Promote business education to the following:
 - Students
 - Parents
 - Business people
 - School boards
 - Administrators
 - Counselors
 - State department of education
 - Other internal and external publics

ACTIVITIES

1. Ask participants to share recruiting ideas.
2. Role play “Membership, What’s In It For Me?”
3. “I don’t join anything because I don’t get anything out of it!” Discuss how you would convince this individual to become a member.
4. “I’m not joining this year because I’m not going to the convention.” How would you convince this individual of continuing membership?
5. Ask participants to describe a promotional strategy.

SECTION VIII: STRATEGIC PLANNING

PURPOSE: To provide direction for the organization through a dynamic, structured, and documented planning process.

Suggested time frame: 15 minutes

1. NEED FOR A STRATEGIC PLAN AND PROGRAM OF WORK TO ACCOMPLISH THE GOALS AND OBJECTIVES OF THE ORGANIZATION

- a. Set direction
- b. Use historical background
- c. Provide documentation
- d. Include future direction

2. LEADERSHIP FOR PLANNING PROCESS

- a. Put plan in writing
- b. Include major components in program of work
 - Objectives
 - Tasks
 - Timelines
 - Personnel responsibilities
- c. Communicate program of work
- d. Document progress
- e. Document results

3. EVALUATION

- a. Monitor progress
- b. Review accomplishments
- c. Access results
- d. Communicate accomplishments to members

ACTIVITIES

1. Review sample program of work.
2. Identify major objectives of current organization (suggestions for changes).
3. Identify three areas where a strategic plan could assist your organization to do things not currently being done.

SECTION IX

ADVOCATING FOR BUSINESS EDUCATION

PURPOSE: To serve students and contribute to the economic well-being of the country by promoting the mission and objectives of business education.

“All politics is local.”

THOMAS P. “TIP” O’NEILL, JR.

Suggested time frame: 45 minutes

DEVELOPING AN ADVOCACY STRUCTURE

- a. Determine mission and objectives plan for advocating for business education
- b. Determine strategies and action plan for accomplishing objectives
 - Formulate message for target groups
 - Administrators
 - Local and s/t/p boards of education
 - Advisory boards
 - Legislators/aides
 - Professional business organizations
 - S/T/P agencies
 - Parent associations
 - Student organizations
 - Develop support documentation for messages
 - Professional in appearance
 - Concise
 - Easy to read
 - Informative and related to objectives
 - Identify a legislative representative and/or business education advocate
 - Obtain business cards for designated business education advocate
 - Identify key audiences to influence
 - Establish business education/legislative network
 - Become familiar with s/t/p legislatures and government departments
 - Develop relationships and linkages before requests are made
 - Obtain contact information on key committees (House and Senate Appropriations; House and Senate Education) and committee members serving on these committees—phone numbers, office locations, addresses, districts. Disseminate this information to members of legislative network.
 - Identify ardent supporters
 - Recognize importance of role of legislative aides

ACTIVITIES

1. Plan a legislative session at s/t/p, regional, and national conferences.
2. Invite legislators or aides to speak at meetings.
3. Review NBEA publications - *HOT TIPS*, *LEGISLATING FOR BUSINESS EDUCATION*, and other publications.
4. Explain legislative process in s/t/p.
5. Develop sample letter to legislator on one issue important to business education.
6. Conduct mock visit to legislator's office.
7. Conduct mock telephone call to legislator.
8. Ask participants if they know a legislator; if so, have they discussed business education issues with the legislator.
9. Include legislators on association mailing lists.