



## **SACUBO STRATEGIC PLAN FY 2016 – FY 2021**

### **MISSION**

**SACUBO contributes to superior higher education financial and administrative services by providing relevant professional development, thought leadership and issue advocacy.**

### **VISION**

**SACUBO promotes excellence in the field of higher education finance and administration.**

### **GOALS**

**Goal 1: Equip business officers with the knowledge and resources needed for operational success.**

#### **Strategy:**

- 1.1** Provide relevant, quality education to members. Embrace SACUBO’s unique, diverse membership through specialized programming.
- 1.2** Share best practices as related to business and financial management. Foster innovation in higher education processes and practices.

#### **Action Plan:**

- 1.1.1** Present meaningful programming through the Fall Workshop, Annual Meeting, Drive-In Workshops and specialized events such as the Women’s Leadership Forum.
- 1.1.2** Support the College Business Management Institute (CBMI) with funding and promotional activities.
- 1.1.3** Consider utilizing a “Call for Proposals” approach for identifying Fall Workshop and/or Annual Meeting sessions to engage the membership more fully.
- 1.2.1** Provide a benchmarking model and/or other tools to assist members in assessing institutional operations.
- 1.2.2** Maintain and improve the Request for Proposal (RFP) library currently housed on the website and offer other opportunities for members to share data, policies and practices.
- 1.2.3** Continue SACUBO’s Best Practice program.

**Goal 2: Develop a communication plan to keep the membership informed and engaged.**

**Strategy:**

- 2.1 Develop and maintain a SACUBO website that is informative, current and reflects the professionalism of the organization.
- 2.2 Perfect a set of mechanisms to allow the membership to be adequately informed of all organizational activities.
- 2.3 Provide networking opportunities to keep SACUBO members connected.

**Action Plan:**

- 2.1.1 Overhaul current website and implement a strategy to keep it up to date.
- 2.2.1 Work with NACUBO to ensure that email can be accurately used to reach the SACUBO membership and targeted segments thereof (e.g. primary representatives, specific job categories - i.e. Controllers - and groups based on former participation in SACUBO events).
- 2.2.2 Determine appropriate social media mechanisms to be utilized by the organization.
- 2.3.1 Provide networking opportunities at all workshops and the Annual Meeting.
- 2.3.2 Continue to view the Summer Planning Meeting as an important networking opportunity for the Constituent Committee members and the Board.

**Goal 3: Provide mechanisms for members to identify and address issues of importance to the finance and management of higher education.**

**Strategy:**

- 3.1 Work closely with NACUBO in identifying and addressing important issues.
- 3.2 Identify and utilize subject experts within the SACUBO membership.

**Action Plan:**

- 3.1.1 Review NACUBO messaging in regard to current issues and ensure the SACUBO membership is kept up to date through the SACUBO website, mass mailings and/or programming.
- 3.1.2 Increase SACUBO participation in NACUBO's legislative activities.
- 3.2.1 Develop a speakers' bureau consisting of SACUBO subject experts. Utilize the speakers both for SACUBO programming and events outside the region.

## **Goal 4: Create a sustainable, long term finance and business plan for SACUBO.**

### **Strategy:**

- 4.1 Review SACUBO's organizational structure and align it with the direction of the organization.
- 4.2 Ensure that membership remains robust and all institutions within the region are aware of the benefits provided by SACUBO.
- 4.3 Encourage members to attend workshops, seminars and the Annual Meeting.
- 4.4 Develop long term financial goals for the organization.
- 4.5 Provide a robust sponsorship program for SACUBO.

### **Action Plan:**

- 4.1.1 Review SACUBO's by-laws, governance and committee structure with an eye toward addressing priorities in the strategic plan and freeing Officers and Board Members to address strategic issues. Special attention should be directed to proper leadership for SACUBO's communication strategy/plan.
- 4.2.1 Consider an annual membership drive to promote the benefits of the organization. Strategies could involve personal contacts, concentration within states and/or using prominent SACUBO members in messaging.
- 4.3.1 Provide scholarships or other types of aid to ensure that SACUBO programming is available to all members.
- 4.4.1 Review the financial position of the organization. Determine adequate levels of assets and reserves and take steps to achieve and maintain them.
- 4.5.1 Identify the best model for maintaining and increasing the current sponsorship program.