



## **SACUBO STRATEGIC PLAN FY 2022 – FY 2027**

### **MISSION**

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

**INNOVATE**

**EDUCATE**

**ADVOCATE**

**LEAD**

### **VISION**

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

### **VALUES**

**Integrity**

**Excellence**

**Engagement**

**Collaboration**

**Innovation**

**Stewardship**

## GOALS

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

### **Strategy:**

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

### **Action Plan:**

- 1.1.1 Present meaningful programming through in-person conferences and virtual options.
  - 1.1.1.1 Leverage the changing role of technology and the value of virtual meetings. Offer dual options at conferences (in-person and online). Evaluate mode of delivery options for Fall Conference and Annual Convention.
  - 1.1.1.2 Consider the expectations of the newer generation of professionals with respect to days of week for conferences as well as virtual presence.
  - 1.1.1.3 Expand on-line CPE opportunities such webinar series. Explore sponsorship opportunities related to providing online programming.
  - 1.1.1.4 Continue specialized programming such as the Leadership Forum and the Mentoring Program.
  - 1.1.1.5 Develop other specialized programming to meet membership needs. Evaluate needs of HBCU and Minority-Serving Institutions and develop appropriate programming.
  - 1.1.1.6 Evaluate keynote speakers, general session content, and breakout sessions to include specific content related to member engagement. (cross-reference 4.2.1)
- 1.1.2 Support the College Business Management Institute (CBMI) with funding for scholarships and promotional activities.
- 1.1.3 Strengthen the use of the Call for Proposals approach to identifying sessions for the Fall Conference and Annual Convention and to engage the membership more fully.
- 1.2.1 Encourage participation in the NACUBO benchmarking opportunities.
- 1.2.2 Continue SACUBO's Best Practice Program. Evaluate ways to promote the program and engage the membership. Explore ways to refresh the program.
- 1.2.3 Maintain and improve the Request for Proposals (RFP) library currently housed on the website and offer other opportunities for members to share data, policies and practices.

**Goal 2: Communicate with members to keep them informed and engaged; actively seek input and feedback to identify and address issues of importance to them and their institutions.**

**Strategy:**

- 2.1 Maintain the SACUBO website with informative, current and professional content.
- 2.2 Develop and refine 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 Implement a strategy to keep the SACUBO website up to date.
- 2.1.2 Encourage institutions to utilize the SACUBO job posting website.
- 2.2.1 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 and utilize appropriate social media mechanisms for the organization.
- 2.3.1 Provide networking opportunities at all conferences, webinars, forums, and the Annual Convention.

**Goal 3: Sustain a viable, long-term financial and business plan.**

**Strategy:**

- 3.1 Ensure that membership remains robust and all institutions within the region are aware of the benefits provided by SACUBO.
- 3.2 Encourage members to attend conferences, webinars, forums and the Annual Convention.
- 3.3 Develop long-term financial goals for the organization.
- 3.4 Strengthen SACUBO's robust sponsorship program.
- 3.5 Work closely with NACUBO in identifying and addressing important issues.
- 3.6 Identify and utilize subject matter experts within the SACUBO membership.

**Action Plan:**

- 3.1.1 Hold an annual membership drive to promote the benefits of the organization. Strategies could include personal outreach, state level concentration and messaging from prominent SACUBO members.
- 3.2.1 Provide scholarships or other types of aid to ensure that SACUBO programming is available to all members.
- 3.3.1 Review the financial outreach of the organization. Determine adequate levels of assets and reserves and take steps to achieve and maintain them.
- 3.3.2 Explore ways to expand and increase revenue streams.
- 3.4.1 Identify the best model for maintaining and increasing the current sponsorship program.
- 3.5.1 Review NACUBO messaging in regard to current issues and ensure the SACUBO membership is kept up to date via the SACUBO website, programming, and social media postings.
- 3.1.1 Increase SACUBO participation in NACUBO's legislative activities.
- 3.1.2 Develop a library of SACUBO subject matter experts. Utilize the library for SACUBO programming and events outside the region.

**Goal 4: Embrace all member engagement in our organization, activities, and planning.**

**Strategy:**

- 4.1 Ensure that our practices and policies advance all membership segments.
- 4.2 Provide professional development opportunities for the membership that incorporates knowledge and skills around all membership segment.
- 4.3 Increase membership of HBCU and Minority-Serving Institutions.
- 4.4 Review organizational structure and recruit engaged individuals for board and committee positions.

**Action Plan:**

- 4.1.1 Develop practices and policies that enhance membership engagement .
- 4.1.2 Recruit individuals to serve on board positions and committees. Consider strategies to recruit non-traditional board members such as a corporate sponsor, a provost, a chief information officer, enrollment officer, etc.
  - 4.2.1 Evaluate our keynote speakers, general session content, and breakout sessions to include specific content related to all segments in the membership. (cross-reference 1.1.1.5)
- 4.3.1 Identify barriers to membership and develop strategies for removing those barriers.
- 4.4.1 Update SACUBO operating procedures and policies to ensure organizational structures support our members and future workforce.