



SACUBO STRATEGIC PLAN FY 2022 – FY 2026

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

Diversity

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, 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 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 Workshop and Annual Meeting. Consider expectations of the newer generation of professionals with respect to days of week for conferences as well as virtual presence.
- 1.1.1.2 Expand on-line CPE opportunities such as the Lunch and Learn series. Explore sponsorship opportunities related to providing online programming.
- 1.1.1.3 Continue specialized programming such as the Women's Leadership Forum and Next Generation Chief Business Officer program.
- 1.1.1.4 Develop other specialized programming to meet membership needs. Evaluate needs of HBCU and Minority-Serving Institutions and develop appropriate programming.
- 1.1.1.5 Evaluate keynote speakers, general session content, and breakout sessions to include specific content related to Diversity, Equity, and Inclusion. (cross-reference 4.2.1)
- 1.1.2 Support the College Business Management Institute (CBMI) with funding and promotional activities.
- 1.1.3 Strengthen the use of the Call for Proposals approach to identifying sessions for the Fall Workshop and Annual Meeting and to engage the membership more fully.
- 1.2.1 Promote use of benchmarking tool among four regions; revise and update based on feedback.
- 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 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 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 workshops and the Annual Meeting.

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 workshops, seminars and the Annual Meeting.
- 3.3 Develop long-term financial goals for the organization.
- 3.4 Strengthen the robust sponsorship program for SACUBO.
- 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 involve personal contacts, concentration within states and/or using prominent SACUBO members in messaging.
- 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 position of the organization. Determine adequate levels of assets and reserves and take steps to achieve and maintain them.
- 3.3.2 Explore ways to diversify 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 through the SACUBO website, programming, and social media postings.
- 3.6.1 Increase SACUBO participation in NACUBO's legislative activities.
- 3.6.2 Develop a library of SACUBO subject experts. Utilize the library for SACUBO programming and events outside the region.

Goal 4: Embrace Diversity, Equity, and Inclusion in our organization, activities, and planning.

Strategy:

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

Action Plan:

- 4.1.1 Develop practices and policies that advance diversity, inclusion, and equity.
- 4.1.2 Recruit diverse individuals to serve on board positions and committees. Consider strategies to recruit nontraditional 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 Diversity, Equity, and Inclusion. (cross-reference 1.1.1.5)
- 4.3.1 Identify barriers to membership for HBCU and Minority-Serving Institutions and develop strategies for removing those barriers.
- 4.4.1 Update SACUBO operating procedures and policies to ensure organizational structures support the diverse background of our members and future diverse workforce.