



**SOUTHERN ASSOCIATION  
OF  
COLLEGE AND UNIVERSITY  
BUSINESS OFFICERS**

**Strategic Operations Plan  
2007-2010**

Approved by SACUBO Board  
April 21, 2007

**SACUBO Vision**

The Southern Association of College and University Business Officers, Inc. (SACUBO), will be the preeminent association of college and university business officers serving its region. This will be evidenced by both the quality of its professional development programs and by the degree of involvement and satisfaction of its members. SACUBO will be supportive of the national association's and other ACUBO's endeavors, and will provide the clearest and most dominant voice for financial and management issues in higher education.

**SACUBO Mission**

SACUBO is a not-for-profit corporation that seeks to further professional development in the areas of higher education finance and management. It is guided by its desire to provide the opportunity for all of its members to receive continuing professional education (CPE); to grow in their chosen profession; and, to provide mechanisms for its members to speak with a unified voice on issues of importance in the finance and management of higher education.

**SACUBO Purposes**

The specific purposes of SACUBO shall be:

- To improve colleges and university financial and administrative support services.
- To provide professional development opportunities that meet the needs of its membership.
- To provide networking opportunities for its membership.
- To promote professional standards and ethical conduct.
- To support the endeavors of the National Association of College and University Business Officers (NACUBO) and the Association of College and University Business Officers' (ACUBO).

**SACUBO Strategic Operations Plan**

The 2007-2010 SACUBO Strategic Operations Plan outlines specific goals, objectives, and action plans prioritized over a three-year cycle to address perceived weaknesses within SACUBO's operations. These operations have been divided into four major areas as follows:

- Governance
- Program
- Financial Condition
- Planning

**Governance**

Governance encompasses the executive level management role practices, membership representation, policies and procedures, archives, bylaws, and operational decision-making processes related to SACUBO fulfilling its stated mission and purpose.

**Programs**

Programs include the four major professional development activities (annual meeting, fall workshop, CBMI, and drive-in workshops). In addition, CPE, scholarships, evaluations, new venues and the use of the SACUBO website are included. ACUBO partnership inclusion into SACUBO's operations requires an analysis for SACUBO's successful implementation of ACUBO programs.

**Financial Condition**

As custodian of SACUBO's financial assets, Board policies and procedures to ensure safeguarding of financial condition must be effective and routinely evaluated by the Board of Directors.

**Planning**

SACUBO's effectiveness requires a clearly established planning process with full participation of the Board of Directors. The planning process should precede budget planning and final approval of a comprehensive operating budget. An effective planning process requires action plans to correct perceived weaknesses over a reasonable time period.

## **SACUBO GOALS**

**GOAL 1 - GOVERNANCE**

By 2010, the SACUBO Board will be recognized within the ACUBO environment for its leadership resulting in successfully achieving goals and objectives contained in its 2007-2010 Strategic Operations Plan.

**GOAL 1 - OBJECTIVE ONE – GOVERNANCE**

*By April 2008, complete reorganization of the governing Board membership.*

**1. Action Planned 2007-08****Bylaws** **BP Manual** 

By February 2007, complete SACUBO's recommended structure for representing SACUBO's interests on the National Association of College and University Business Officers' governing Board.

**Responsibility**

- Board President

**Assessment Methodology**

- Approved SACUBO recommendation.

**2. Action Planned 2007-08**Bylaws BP Manual 

By April 2008, present an in-depth assessment of the SACUBO governance infrastructure identifying changes for improving the Board's effectiveness and participation.

**Responsibility**

- Directors at Large

**Assessment Methodology**

- Board acceptance of report

**3. Action Planned 2008-09**Bylaws BP Manual 

By February 2008, establish a timeline and process for conducting a periodic review of SACUBO's existing contracts.

**Responsibility**

- First Vice President

**Assessment Methodology**

- Report accepted by Board

**4. Action Planned 2008-09**Bylaws BP Manual 

By April 2009, present for Board approval a plan to establish a formal archival process for protecting and preserving SACUBO's historical records.

**Responsibility**

- SACUBO Secretary

**Assessment Methodology**

- Board approval of archival plan.

**5. Action Planned 2009-10**Bylaws BP Manual 

By February 2010, complete an assessment of SACUBO's Committee Structure excluding the Professional Development Committee, identifying areas requiring changes by the Board of Directors.

**Responsibility**

- Third Vice President

**Assessment Methodology**

- Acceptance of report by Board

**6. Action Planned 2009-10**Bylaws BP Manual 

By February 2010, conduct an intensive review of SACUBO Bylaws to include recommendations for changes for Board action April 2010.

**Responsibility**

- Immediate Past President

**Assessment Methodology**

- Approval by membership vote.

**7. Action Planned 2007-08**Bylaws BP Manual 

By the Winter Board Meeting, *annually* present nominations for the upcoming SACUBO year.

**Responsibility**

- Nominating Committee

**Assessment Methodology**

- Board accepts nominations.

**8. Action Planned 2007-08**Bylaws BP Manual 

By the Winter Board Meeting, *annually* present for Board approval updates and modifications of SACUBO's Policies and Procedures.

**Responsibility**

- Immediate Past President

**Assessment Methodology**

- Report at Winter Board Meeting

**GOAL 2 – PROGRAMS**

Within three years SACUBO will become the first option/preeminent means for professional development delivery among the membership.

**GOAL 2 - OBJECTIVE ONE – PROGRAMS**

*Provide a comprehensive, ever changing array of continuing professional education opportunities for colleagues and clients in college and university administration as measured by increased participation rates in professional development offerings.*

**1. Action Planned 2007-08**

Bylaws

BP Manual

By February 2009, establish a Professional Development Committee with clearly defined expectations and an approved budget.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Board approval of the newly structured Professional Development Committee

**2. Action Planned 2007-08**

Bylaws

BP Manual

By April 2008, implement, in coordination with NACUBO, ACUBO, and CBMI, a specialized track to prepare Associate/Assistant Vice Presidents/CBO Direct Report Directors to move into the Chief Business Officer ranks when needed.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Completion of the course objectives, curriculum, and enrollment criteria by August 2007.

**3. Action Planned 2009-10**Bylaws BP Manual 

By April 2008, secure sponsorship for SACUBO Drive In Workshop Program

**Responsibility**

- Sponsorship Coordinator

**Assessment Methodology**

- Board approval of contract.

**4. Action Planned 2008-09**Bylaws BP Manual 

By April, 2008, provide results of a comprehensive assessment of SACUBO's Scholarship Program

**Responsibility**

- Chair, SACUBO Scholarship Committee

**Assessment Methodology**

- Board Approval of Report

**5. Action Planned 2008-09**Bylaws BP Manual 

By February 2009, transfer responsibility for the CPE Program to the Professional Development Committee.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Board approval of Transfer

**6. Action Planned 2007**Bylaws BP Manual 

By April 2009, implement a comprehensive process for conducting program evaluations for SACUBO's 2007 Fall Workshop and 2008 Annual Meeting.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Board approval of the newly structured Professional Development Committee

**7. Action Planned 2007**

**Bylaws**

**BP Manual**

By 2009, present for Board approval a comprehensive plan to offer Drive In Workshops within each State on an annual basis.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Board approval of Plan

**8. Action Planned 2007-08**

**Bylaws**

**BP Manual**

By June annually, topics and speakers for the upcoming Fall Workshop will be finalized in accordance with the Professional Development Committee charge.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Release of Fall Workshop Program

**9. Action Planned 2007-08**

**Bylaws**

**BP Manual**

By August, Fall Workshop data will be populated in InReach Conference Solutions and summarized as a part of the final report for use by subsequent responsible persons.

**Responsibility**

- Second Vice President

**Assessment Methodology**

- Confirmation by Second Vice President to Board

**10. Action Planned 2007-08**

Bylaws

BP Manual

By November, topics and speakers for the upcoming Annual Meeting will be identified and finalized in accordance with the Professional Development Committee charge.

**Responsibility**

- Professional Development Committee

**Assessment Methodology**

- Release of Annual Meeting Program

**11. Action Planned 2007-08**

Bylaws

BP Manual

SACUBO will maintain annual currency as a registered member of the National Association of State Boards of Accountancy (NASBA).

**Responsibility**

- NASBA Coordinator or Designee

**Assessment Methodology**

- Annual Report to Board

**12. Action Planned 2007-08**

Bylaws

BP Manual

Present an annual report at the Fall Workshop to the SACUBO Board of Directors articulating unmet PD and certification compliance.

**Responsibility**

- Chair of Professional Development Committee

**Assessment Methodology**

- Board Approved Report

**13. Action Planned 2007-08**

Bylaws

BP Manual

By April annually, plans will be presented for the upcoming August CBMI Workshop.

**Responsibility**

- CBMI Coordinator

**Assessment Methodology**

- Board confirming receipt of CBMI Plans

**14. Action Planned 2007-08**

**Bylaws**

**BP Manual**

By June annually, a first draft of planned sites/topics for Drive-In Workshops will be presented to the Board.

**Responsibility**

- SACUBO Drive-In Workshop Coordinator

**Assessment Methodology**

- Board Approval of Drive-In Workshop upcoming Plans

**GOAL 2 - OBJECTIVE TWO - PROGRAMS**

*To provide a state-of-art SACUBO website for online communication with membership.*

**1. Action Planned 2007-08**

**Bylaws**

**BP Manual**

By April 2007, complete a comprehensive evaluation of the SACUBO website and provide recommendations with cost estimates for any modification or upgrade.

**Responsibility**

- SACUBO Database Administrator

**Assessment Methodology**

- Board acceptance of report.

**2. Action Planned 2007-08**

**Bylaws**

**BP Manual**

Within 60 days following an SACUBO sponsored professional development event, the elements in the NACUBO Database will be updated.

**Responsibility**

- SACUBO Database Administrator

**Assessment Methodology**

- Database update confirmed at Board meeting.

**3. Action Planned 2007-08**

Bylaws

BP Manual

Participants attending the Annual Meeting and Fall Workshop will be reported to the Database Administrator for inclusion in the NACUBO database.

**Responsibility**

- Professional Development Committee/MRA Services, Inc.

**Assessment Methodology**

- Confirmation by DBA

**4. Action Planned 2007-08**

Bylaws

BP Manual

Faculty presenting at the Annual Meeting, Fall Workshop and Drive-In Workshops will be reported to the Database Administrator for inclusion in the NACUBO database.

**Responsibility**

- Professional Development Committee
- MRA Services, Inc.

**Assessment Methodology**

- Confirmation by DBA

**GOAL 3 - FINANCIAL CONDITION**

Within three years identify the criteria SACUBO will adopt to define its financial stability.

**GOAL 3 - OBJECTIVE ONE – FINANCIAL CONDITION**

*Establish the investment, budgeting and execution concepts to be utilized by SACUBO.*

**1. Action Planned 2007-08**

Bylaws

BP Manual  Att B

By February, 2008, create a standing Investment Advisory Committee to review/revise the Investment Policy and Procedures, adopt an asset allocation plan, articulate performance benchmarks, and define a spending plan that correlates with specific budgetary line items.

**Responsibility**

- Ad Hoc Committee

**Assessment Methodology**

- Approval Advisory Committee Report.

**2. Action Planned 2007-08**

Bylaws

BP Manual

By February 2008, complete a review and rewrite of the SACUBO's budgeting process including but not limited to the budget input and oversight, program budgeting, policy manual changes, fee structure, and reporting.

**Responsibility**

- Treasurer – Ad Hoc Committee

**Assessment Methodology**

- Board acceptance of report

**3. Action Planned 2008-09**

Bylaws

BP Manual

By February 2009, develop a post-audit process to be used as an evaluation of SACUBO's Professional Development Programs.

**Responsibility**

- Chair, Audit Committee

**Assessment Methodology**

- Board approval of plan.

**GOAL 4 - PLANNING**

By 2010, attain the highest level of membership within the ACUBOs.

**GOAL 4 - OBJECTIVE ONE - PLANNING**

*By April 2008, adopt a comprehensive planning process with timelines reconciling the program planning process with the budgeting process.*

**1. Action Planned 2007-08**

Bylaws

BP Manual

By February 2008, a complete review of the current program planning processes will be completed and include specific recommendations for reconciling program planning in advance of the budget approval actions of the Board.

**Responsibility**

- President

**Assessment Methodology**

- Cyclical planning process approved by Board.

**GOAL 4 - OBJECTIVE TWO - PLANNING**

*By April 2010, recruit one hundred percent of eligible non-member institutions.*

**1. Action Planned 2007-08**

**Bylaws**

**BP Manual**

By September 2008, complete an updated listing of all state business officers associations within the southern region.

**Responsibility**

- Third Vice President

**Assessment Methodology**

- Final report accepted by Board

**2. Action Planned 2008-09**

**Bylaws**

**BP Manual**

By April 2009, update the SACUBO Recruitment and Participation Plan and coordinate placing the updated plan on the SACUBO website with the Database Administrator.

**Responsibility**

- Third Vice President

**Assessment Methodology**

- Approved Recruitment and Retention Plan

