



## **EACUBO**

### **Strategic Plan**

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## **Mission**

In support of the instructional, research and public service missions of higher education, EACUBO exists **to promote effective and ethical business and financial administration in colleges and universities in the Eastern region.**

EACUBO's mission is carried out by:

- Designing and producing professional development activities;
- Promoting inter-institutional communication and cooperation among business and financial officers; and
- Disseminating information on current and future issues affecting business and financial administrators.

## **Core Values**

- Professional Development
  - Our members avail themselves of career-long learning opportunities
- Sense of Community/Collegiality
  - Our members build community through participation, networking, dialogue and collaboration
- Integrity and Ethical Behavior
  - Our members exhibit integrity and ethical behavior
- Respect for Diversity
  - Our members respect the diversity of people, ideas and institutions

## **GOAL I: PROFESSIONAL DEVELOPMENT OPPORTUNITIES**

**EACUBO's membership will have timely, relevant, high quality professional development opportunities.**

### **A. Envisioned Future (7 year planning horizon)**

Members recognize EACUBO as the primary development resource for the development of skills that will enhance their effectiveness as leaders on their campuses.

### **B. Vivid Description (Success 7 years into the future)**

1. EACUBO is seen as the #1 resource for professional development for college and university officers in the Eastern Region.
2. Relevant professional development offerings are available for members at all professional levels and across all constituent groups. Participation of mid and senior level members exceeds historical levels and the organization experiences expanded participation of entry-level members and 2-year college members (and other underserved groups).

### **C. Objectives and Strategies (2 year time horizon):**

1. Increase non-traditional delivery of programs.
  - a) Develop on-demand programming (e.g., avail ourselves of ACUBO webinar template).
  - b) Partner with other associations to build an on-line programming repository.
2. Achieve coverage of the newly established competency framework.
  - a) Endorse, communicate and embed competencies in each programming committee.
  - b) Develop consistent mechanisms for periodic assessment of prospective professional development programs. Establish method for each program committee to report how they will address competencies as set forth in the framework.
  - c) Identify, endorse and communicate to members appropriate professional development opportunities offered by other organizations, as more fully discussed under Goal III, Partnerships.
3. Enhance differentiation of program offerings.
4. Ensure coverage of emerging issues.
  - a) Identify sources of relevant emerging topics (e.g., on-line repository, Programming Council, use constituency sessions and APC).

5. Strengthen quality control methods.
  - a) Develop alternative post-program assessment mechanism - electronic, real time, consistent.
  - b) Establish consistent and informative reporting from the assessment mechanism.

**D. Measures of Near-Term Success (2 year time horizon):**

1. EACUBO is seen as the #1 resource for professional development for college and university officers in the Eastern Region.
  - a) Attendees to all programs will be able to receive CPEs. *[Program Prefect, Program Council]*
2. Relevant professional development offerings are available for members at all professional levels and across all constituent groups. Participation of mid and senior level members exceeds historical levels and the organization experiences expanded participation of entry-level members and 2-year college members (and other underserved groups).
  - a) Program Council will have measurable data to enable committees to provide program offerings to address needs for varying sectors and participants. *[Program Prefect, Program Council]*
  - b) The content coverage of EACUBO-delivered programs is mapped to the competency framework. *[Program Prefect, Program Council]*
  - c) Member participation as speakers is tracked and has increased. *[Program Council]*
  - d) Mechanism has been developed to ensure that emerging issues are covered through EACUBO programming. *[Program Council]*

## **GOAL II: MEMBERSHIP**

**EACUBO will have an active membership that reflects diversity in the size and type of institution in our region and diversity of individual participants (functional responsibilities and organizational level).**

### **A. Envisioned Future (7 year planning horizon)**

EACUBO will have comprehensive participation among potential member institutions and robust engagement with the organization within each member institution.

### **B. Vivid Description (Success 7 years into the future)**

1. Membership regards EACUBO programs as the highest quality programming in our profession, as measured by attendee evaluations.
2. EACUBO's membership includes all colleges and universities in the core Eastern Region.
3. At least one representative of each member institution will participate annually by attending or participating as a speaker in one or more professional development programs.
4. Over the course of each year, attendance at professional development programs will mirror the institutional diversity of the EACUBO organization and program offerings will attract attendees from all organizational levels.

### **C. Objectives and Strategies (2 year time horizon):**

1. Evaluate whether program offerings address needs of varying sectors and participants (before and after program is offered; individual and cumulative)
2. Influence Chief Business Officers (CBOs) to increase the number of participants and increase engagement/participation if they are already an active institution.
  - a) Identify two additional annual networking/roundtable type face-to-face options. Solicit ideas for content that appeals.
  - b) Research total participation (major meetings and APC) to really understand the gap and then "sell" to the Chief Business Officers. C)
  - c) Use MRA (or other consolidator) as compiler for database.
  - d) Develop personal outreach and "benefits marketing piece" to Chief Business Officers, building on the success of the recruitment plan used for the Senior Business Officers Roundtable.
  - e) Contact existing groups (e.g., state associations, community college groups) to obtain information on their needs and to market EACUBO programming. Attend their meetings.

#### **D. Measures of Near-Term Success (2 year time horizon):**

1. Membership regards EACUBO programs as the highest quality programming in our profession, as measured by attendee evaluations.
  - a) Program evaluations will indicate satisfaction that meets or exceeds expectations. *[Membership Committee in association with Constituent Committees]*
2. EACUBO's membership includes all colleges and universities in the core Eastern Region.
  - a) Membership among Small Colleges and Two Year Colleges will increase to approximately 95% of eligible institutions (from 90% and 84% respectively), and membership among Research and Comprehensive institutions will be maintained at their current 96% level or higher. *[Membership Committee in association with Constituent Committees]*
3. At least one representative of each member institution will participate annually by attending or participating as a speaker in one or more professional development programs.
  - a) The number of member institutions represented through attendance or participation as speakers will increase in each of the two years. *[Membership Committee in association with Constituent Committees]*
4. Over the course of each year, attendance at professional development programs will mirror the institutional diversity of the EACUBO organization and program offerings will attract attendees from all organizational levels.
  - a) The discrete number of institutions participating in professional development programs will increase in each of the next two years. *[Membership Committee in association with Constituent Committees]*
  - b) The number of individuals identified as Chief Business Officers who participate in professional development activities will increase over the next two years. *[Membership Committee in association with Constituent Committees]*
  - c) EACUBO will provide programming that is targeted to individuals in diverse organizational levels and see an increase in participation at professional development programs at each level. *[Membership Committee in association with Constituent Committees]*

### **GOAL III: BENEFITS THROUGH EFFECTIVE PARTNERSHIPS**

**Members and customers of EACUBO will benefit from a wide variety of programs and information through effective partnerships.**

#### **A. Envisioned Future (7 year planning horizon)**

EACUBO is a recognized and respected partner with related professional associations in ensuring a comprehensive collage of professional development offerings across the spectrum of issues impacting the optimal operation of college and university business operations.

#### **B. Vivid Description (Success 7 years into the future)**

1. Membership looks to EACUBO as a conduit for professional development – provider, partnership, resource/facilitator – linked to the competency framework. Members view EACUBO as their ‘portal’ to professional development offerings and other resources presented by the region, by ACUBO, and by NACUBO through effective presentation of consolidated program offerings.
2. EACUBO members have the opportunity to attend professional development programs provided with and/or by an array of different partnering groups (e.g., Educause, CUPA, APPA, AGB, AICPA).

#### **C. Objectives and Strategies (2 year time horizon):**

1. Enhance EACUBO partnerships.
  - a) Promote active participation in ACUBO structure.
  - b) Exploit competencies framework to its fullest extent.
  - c) Develop joint regional programs, particularly with CACUBO and SACUBO.
2. Achieve a stronger working relationship with NACUBO in order to ensure access to important information and services for our members.
  - a) Identify information sources and advertise to our members (e.g., knowledge network).
  - b) Identify and actively communicate member needs that are best met at the national level (i.e., audit guide development)
  - c) Engage new president in regional concerns.
3. Increase relationships with other groups or entities in (or supporting) higher education for targeted joint programming.
  - a) Carefully identify other key groups (i.e., not necessarily professional associations, could be groups of other CBOs)
  - b) Identify key synergies.
  - c) Identify gaps in our programs that -EACUBO members need to have (i.e., EDUCAUSE regional programs).

4. Increase opportunities for cooperative programming with member institutions.
  - a) Explore opportunities to engage member institutional experts in meeting special programming needs, and co-sponsor already existing institutional programs that meet member needs.

**D. Measures of Near-Term Success (2 year time horizon):**

1. Membership looks to EACUBO as a conduit for professional development – provider, partnership, resource/facilitator – linked to the competency framework.
  - a) Some of the more obvious partners for PD opportunities are identified, with some of their offerings tied to the competency framework. *[Program Prefect, Program Council]*
  - b) Provide endorsement of particular program offerings through the application of the Sponsorship procedures outlined in the Operations Manual. *[Program Prefect, Program Council]*
2. EACUBO members have the opportunity to attend professional development programs (within calendar year) provided with an array of different partnering groups (e.g. Educause, CUPA, APPA, AGB, AICPA).
  - a) A process for mapping has been developed and members have access (via website) to a core competency matrix that links course offerings to our partners (e.g., ACUBOs, etc.) *[Program Prefect, Program Council]*
  - b) EACUBO members attend core competency programs developed in cooperation with the ACUBOs. *[Program Council]*

## **GOAL IV: INFRASTRUCTURE AND RESOURCES**

**EACUBO's organizational structure and financial resources will be adequate to fulfill our mission.**

### **A. Envisioned Future (7 year planning horizon)**

EACUBO's infrastructure and financial resources will fully support the most effective use of its volunteers.

### **B. Vivid Description (Success 7 years into the future)**

1. The organization outsources all activities not core to its mission, thus raising the professionalism of the operations of the organization. Infrastructure is in place to enable volunteers to focus primarily on delivery of quality PD program **content** and facilitating member networking.
2. EACUBO has sufficient operating revenues and reserves to support that infrastructure.
3. An information repository (a physical or digital 'office' of meeting minutes, speaker files, etc.) exists.
4. A robust orientation program is in place for each volunteer role.
5. Board members, chairs and vice chairs have an effective communication delivery system to effect the sharing of information.
6. An effective volunteer recruitment, development and evaluation structure is in place.

### **C. Objectives and Strategies (2 year time horizon):**

1. Improve the effectiveness of the organizational structure between the board and its committees.
  - a) Define the board member's participatory role with the committee.
  - b) Maintain the involvement of committee chairs and vice chairs at board retreats.
2. Enhance committee membership and recruitment so that volunteers reflect the membership base and support the work of individual committees to provide services to their constituents.
  - a) Implement revised constituency groups consistent with NACUBO.
  - b) Develop an effective approach to recruiting volunteers for committee involvement: whom, how, when, where.
3. Maintain adequate financial resources to ensure financial solvency.
  - a) Develop annual budgets that adhere to board philosophy on resource allocation.
  - b) Ensure that budget development includes annual review of membership dues and registration fees.
  - c) Monitor financial activity to ensure compliance.
  - d) Monitor effectiveness of outsourced contracts.

**D. Measures of Near-Term Success (2 year time horizon):**

1. The organization outsources all activities not core to its mission, thus raising the professionalism of the operations of the organization. Infrastructure is in place to enable volunteers to focus primarily on delivery of quality PD program **content** and facilitating member networking.
  - a) A vendor provides key services for initial stage of outsourcing of administrative functions. [*Association Resources Transition Team*]
  - b) Position descriptions identify tasks that are candidates for future outsourcing. [*Secretary*]
2. EACUBO has sufficient operating revenues and reserves to support that infrastructure.
  - a) Revenues are adjusted to support initial stage of outsourcing. [*Treasurer and Sponsorship Coordinator*]
3. An information repository (a physical or digital 'office' of meeting minutes, speaker files, etc.) exists.
  - a) Scope of repository defined. [*Secretary, Information Coordinator, First VP, Historian*]
4. A robust orientation program is in place for each volunteer role.
  - a) Orientation program is revamped. [*Program Prefect and Secretary*]
5. Board members, chairs and vice chairs have an effective communication delivery system to effect the sharing of information. [*All, Information Coordinator*]
6. An effective volunteer recruitment, development and evaluation structure is in place. [*First VP, Information Coordinator*]