

**ACBO STRATEGIC PLAN** *2014-15 Annual Planning Activities and Actions*

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**Spring 2015 Semi-Annual Meeting**

**May 19, 2015 – Santa Rosa**

# Goal I

Provide professional development to ACBO members and associates including: education; training; mentoring; networking; and, resource materials.

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## Objective 1

Improve communications to membership regarding ACBO task force activities.

- **Activities:** Promote awareness; enhance communication methods; timely access to materials; conference presence; and website overview.
- **Assessment:** Brian Fahnestock appointed as task force/committee coordinator; and Steve Crow assigned to review website. Also, added “Guidebook” app to improve onsite communication with conference participants.

# Goal I

Provide professional development to ACBO members and associates including: education; training; mentoring; networking; and, resource materials.

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## Objective 2

Continue to provide outreach, mentoring, supportive services and training to new and current financial administrators.

- **Activities:** Offer an Institute and a one day drive-in workshop; regional representatives to provide status updates between conferences; promote task force opportunities; mentor new CBOs; and explore CBO training.
- **Assessment:** Institute I offered/completed in February/March 2015; enrollment management 2-day workshop scheduled for August 2015; and Brian Fahenstock appointed task force/committee coordinator to notify the field of opportunities.

# Goal I

Provide professional development to ACBO members and associates including: education; training; mentoring; networking; and, resource materials.

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## Objective 3

Formulize a process for CPE credit by including it on conference program.

- **Activities:** Implement for Spring 2014 conference; assign a CBO to establish the process and oversee; and document retention by ACCCA with procedures administration by ACBO Board.
- **Assessment:** CPE coordinator established and appointed to oversee process; ACCCA staff trained on required record keeping; Spring 2014 CPE tracked and certificates given; and Fall 2014 CPE tracked and certificates given.

# Goal I

Provide professional development to ACBO members and associates including: education; training; mentoring; networking; and, resource materials.

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## Objective 4

Identify resource materials to be added to ACBO website.

- **Activities:** Create an ABCO Handbook, outlining the association's history to use as a reference book for the organization and future boards. Add handbook to ACBO website upon completion.
- **Assessment:** Kathy Blackwood has begun work on identifying resource materials to be added to the website. Bonnie Ann Dowd is developing an operations handbook including historic information about ACBO.

# Goal II

Promote professional standards and ethical conduct for business officers to enhance institutional, administrative, and financial effectiveness.

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## Objective 1

Develop an ACBO Code of Ethics.

- **Activities:** Implement plan/process for earning CPE; develop language for ACBO Code of Ethics to present at Spring conference; develop ethics topic session for Spring conference; and implement CPE credit opportunities for Spring conference.
- **Assessment:** CPE credit and reporting process complete; Code of Ethics developed, added to ACBO website; ethics sessions offered at Spring/Fall 2014 & Spring 2015 conferences; ethics training to be incorporated in all future conferences. CPE tracked with certificates awarded at Spring and Fall 2014 conferences.

# Goal III

Strengthen communication and dialogue among CBOs of California community colleges and officials of other organizations and governmental agencies.

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## Objective 1

Establish a semi annual process for review, enhancement and updating information on the directory by the region representatives.

- **Activities:** Maintain a process for a current directory; and delegate oversight to a Board member.
- **Assessment:** Steve Crow appointed to review the website.

# Goal III

Strengthen communication and dialogue among CBOs of California community colleges and officials of other organizations and governmental agencies.

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## Objective 2

Encourage and support regional meetings throughout the year.

- **Activities:** Encourage and support regional meetings throughout the year.
- **Assessment:** Ann-Marie Gabel has been holding Southern California CBO meetings, and Andy Suleski has been holding Northern California CBO meetings regularly.



# Goal III

Strengthen communication and dialogue among CBOs of California community colleges and officials of other organizations and governmental agencies.

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## Objective 3

Expand communications through regularly published articles in affiliate newsletters and identify other options for increasing communications.

- **Activities:** On-going continuous process; continue efforts thus far and improve by adding other means of communication.
- **Assessment:** Presentation at CCLC Annual Trustees Conference.

# Goal III

Strengthen communication and dialogue among CBOs of California community colleges and officials of other organizations and governmental agencies.

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## Objective 4

Strengthen operational working relationship with ACCCA.

- **Activities:** Review and update MOU in preparation of contract renewal.
- **Assessment:** MOU up for renewal next year.

# Goal IV

Provide leadership and advocacy in finance, facilities, and administrative issues facing California community colleges.

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## Objective 1

Continue to maintain and enhance existing ACBO linkages/relationships with other entities/organizations.

- **Activities:** Continue to actively engage in legislative advocacy on financial affairs; and continue to provide oversight and work with other organizations.
- **Assessment:** Letters of support and other work for STRS legislation; established operating guidelines in support of the State Chancellor's efforts to create Fiscal Advisory Workgroup of 13 CBOs in the state system; and DOF staff regularly attend ACBO Board meetings. Working with IEPI on professional development & assistance teams.

# Goal IV

Provide leadership and advocacy in finance, facilities, and administrative issues facing California community colleges.

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## Objective 2

Establish on-going relationship with ACCJC.

- **Activities:** Maintain and enhance relationship with ACCJC.
- **Assessment:** ACBO Board members serving as accreditation advisors; and regional representatives assisting with appointing a CBO on each accreditation team.

# Goal IV

Provide leadership and advocacy in finance, facilities, and administrative issues facing California community colleges.

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## Objective 3

Expand legislative advocacy relationship.

- **Activities:** Identify key opportunities to impact legislative issues; encourage testifying by Board and CBO members at legislative hearings; and co-host annual legislative mixer with ACCCA and CCLC.
- **Assessment:** CCLC legislative advocate regularly attends ACBO Board meetings; letters of support provided to CCLC and ACCCA on key legislation with fiscal impacts for CCCs; and co-hosted annual legislation mixer as part of the Annual State Budget Workshop with ACCCA and CCLC the last two years.

# ACBO REGION REPRESENTATIVES

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- **Region One:** Dave Clausen, Siskiyou CCD
- **Region Two:** Jeff DeFranco, Lake Tahoe CCD
- **Region Three:** Kathy Blackwood, San Mateo CCD
- **Region Four:** Ed Maduli, West Valley Mission CCD
- **Region Five:** Tom Burke, Kern CCD
- **Region Six:** Brian Fahnestock, Allan Hancock CCD
- **Region Seven:** Jeanette Gordon, Los Angeles CCD
- **Region Eight:** Ann-Marie Gabel, Long Beach CCD
- **Region Nine:** Aaron Brown, Riverside CCD
- **Region Ten:** Steve Crow, Southwestern CCD

# FISCAL STANDARDS TASK FORCE

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- **Andy Suleski**, *Chair*, Butte-Glenn Community College
- **Kim McCord**, South Orange County CCD
- **Felipe Lopez**, Compton CCD
- **Theresa Matista**, Los Rios CCD
- **Rosalinda Buchwald**, Citrus CCD
- **Raquel Puentes-Griffith**, San Joaquin Delta CCD
- **Kevin McElroy**, Foothill-DeAnza CCD
- **Joann Schultz**, Merced CCD
- **Jeanette Gordon**, Los Angeles CCD
- **Mario Rodriguez, Teena Atalig, Tracy Britten, and Michael Yarber**, Chancellor's Office

# FACILITIES TASK FORCE

CBO Representatives	Facilities Directors
<b>Ann-Marie Gabel</b> – Chair, Long Beach CCD	<b>Dave Clinchy</b> , Los Rios CCD
<b>David El Fattal</b> , Cerritos College	<b>Brandye D'Lena</b> , South Orange County CCD
<b>Becky Elam</b> , Mt. San Jacinto CCD	<b>Rick Williams</b> , North Orange County CCD
<b>Peter Hardash</b> , Rancho Santiago CCD	<b>Ken Stoppenbrink</b> , West Hills CCD
<b>Kuldeep Kaur</b> , Yuba CCD	<b>Steve Macias</b> , MiraCosta CCD
<b>Ed Maduli</b> , West Valley-Mission CCD	<b>Jose Nunez</b> , San Mateo CCD
<b>Doug Smith</b> , San Jose-Evergreen CCD	<b>Eric Mittlestead</b> , Sequoias CCD
	<b>Tony Ichsan</b> , Sonoma County CCD
	<b>Fred Diamond</b> , Citrus College



# ACBO BOARD APPOINTMENTS

<b>On-Line Education Group</b>	<i>Morris Rodrigue (Shasta Tehama Trinity CCD)</i>
<b>ACCCA Great Deans Planning Team</b>	<i>G.H. Javai</i>
<b>AB 86 Workgroup/Adult Ed</b>	<i>JoAnn Higdon (El Camino College)</i>
<b>CTE Program Workgroup</b>	<i>Kuldeep Kaur (Yuba CCD)</i>
<b>Institutional Effectiveness Partnership Initiative (IEPI) Advisory Board</b>	<i>Claudette Dain (Citrus College) and Davit Kachatryan (Irvine Valley College); Doug Roberts (Santa Rosa Jr. College) and Lisa Howell (Desert CCD) alternates.</i>
<b>Student Support Services Programs (SSSP) Budget Review Panel</b>	<i>Greg Nelson (Marin CCD) and Russi Egan (Palo Verde CCD)</i>
<b>Student Equity Review Task Force</b>	<i>No appointments</i>
<b>Community College Facilities Coalition (CCFC)</b>	<i>Ed Maduli (West Valley Mission CCD)</i>

# Future Conference Sites

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## Future Spring Conferences (Northern)

- 2016 – Hyatt Monterey
- 2017 – Resort at Squaw Creek, Lake Tahoe
- 2018 – Hyatt Vineyard Creek, Santa Rosa
- 2019 – Resort at Squaw Creek, Lake Tahoe
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## Future Fall Conferences (Southern)

- 2015 – Crowne Plaza Redondo Beach
- 2016 – Omni Rancho Las Palmas, Palm Desert
- 2017—TBD
- 2018 -- Omni Rancho Las Palmas, Palm Desert
- 2019 -- TBD

## INSTITUTIONAL EFFECTIVENESS PARTNERSHIP INITIATIVE

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The Institutional Effectiveness Partnership Initiative is seeking more CBOs to serve on Partnership Resource Teams (PRTs), each of which will visit a college in need at least three times to understand the issues thoroughly, help the college develop a plan for improvement, and provide follow-up support as needed. The selection of PRT members is based on a careful match between each member's areas of expertise and the specific needs of the client college. To facilitate the matching process, please click on the link below and complete the online survey. It should take you no more than about five minutes (plus time for any comments you may wish to add).

We provide training for PRT members, first through a webinar that covers basic IEPI information, and then in a scenario-based workshop. Your travel expenses as a member of a PRT, including those for attending the workshop, will be reimbursed. If your local district policy permits it, you may also receive a stipend for your PRT service.

**For the online survey:** <https://www.surveymonkey.com/r/IEPI-PRT-ExpertiseInventory2015-2>

**For more information on the IEPI:** <http://www3.canyons.edu/Offices/IEPI/faq.html>

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**Thank you for your time!**

**Any questions?**