

**ACBO STRATEGIC PLAN 2015  
(Three Year Plan 2012-2015)**

**2014-15 ANNUAL PLANNING ACTIVITIES AND ACTIONS**

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

<b>OBJECTIVE</b>	<b>2014-15 ACTIVITIES</b>	<b>ASSESSMENT</b>
<p><b>1)</b> Improve communications to the field with regard to ACBO task force activities</p>	<p><b>a)</b> Promote awareness of ACBO task force committees.</p> <p><b>b)</b> Develop new and enhance existing methods of communications with the field.</p> <p><b>c)</b> More and timely access to agendas and meeting notes for both board and task forces to be provided via web site, and a greater presence at conferences.</p> <p><b>d)</b> Assign website overview and content updates to a board member to maintain with staff assistance as needed.</p>	<p><b>a)</b> Brian Fahnestock, Region 6 Rep., appointed as the task force/committee coordinator.</p> <p><b>b)</b> Introduced “Guidebook” app to improve onsite communication with conference participants.</p> <p><b>d)</b> Steve Crow, Region 10 Rep., assigned to review website.</p>
<p><b>2)</b> Continue to provide outreach, mentoring, supportive services &amp; training to new and current financial administrators.</p>	<p><b>a)</b> Offer an Institute</p> <p><b>b)</b> Offer a focused one day drive-in workshop – Repeat with enhancements – Accreditation</p> <p><b>c)</b> Regional Reps to provide status updates in between membership’s semi-annual meetings. Develop a common mechanism to use</p> <p><b>d)</b> Promote awareness of task force opportunities to expand field of volunteers serving.</p> <p><b>e)</b> Explore options on ways to reach out and mentor new CBOs.</p>	<p><b>a)</b> Institute I offered and completed February-March 2015.</p> <p><b>b)</b> Workshop on enrollment management scheduled for August 2015.</p> <p><b>d)</b> Brian Fahenstock, Region 6 Rep., appointed as the task force/committee coordinator in order to notify the field of opportunities as they occur.</p>

	<b>f)</b> Explore a CEO training as requested by CEO board.	
<b>3)</b> Formulize a process for CPE credit by including on conference program	<b>a)</b> Implement for Spring 2014 conference and include work toward listing in all conference programs. Also, assign a CBO member to establish the process and reporting requirements and oversee. Documents to be retained by ACCCA staff along with procedure developed to be administered by ACBO Board with support of ACCCA staff	<b>a)</b> CBO established and appointed a CPE coordinator to oversee the process and trained ACCCA staff on required record keeping. <b>a)</b> Spring 2014 CPE tracked and certificate given. Fall 2014 CPE tracked and certificate given.
<b>4)</b> Identify resource materials to be added to ACBO website.	<b>a)</b> Create ACBO Handbook documenting why and how formed, how evolved, brief history of WSR recipients, etc.to act as a reference book for the organization and all future boards.  <b>b)</b> Place handbook on the ACBO website when completed.	<b>a)</b> Kathy Blackwood, Region 3 Rep., has begun work on identifying resource materials to be added to website.  <b>b)</b> Bonnie Dowd is developing an operations handbook including historic information about ACBO.

**2014-15 ANNUAL PLANNING ACTIVITIES AND ACTIONS**

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

<b>OBJECTIVES</b>	<b>2014-15 ACTIVITIES</b>	<b>ASSESSMENT</b>
<p><b>1)</b> Develop an ACBO Code of Ethics.</p>	<p><b>a)</b> Implement plan/process for earning CPE.</p> <p><b>b)</b> Develop and implement language for ACBO Code of Ethics to be taken to the Spring 2014 conference for approval.</p> <p><b>c)</b> Committee to develop an ethics topic session to be included in the Spring 2014 conference.</p> <p><b>d)</b> Implement CPE credit opportunities for the Spring 2014 conference.</p>	<p><b>a)</b> Completed using AICPA and other organization criteria for granting CPE credit and reporting requirements.</p> <p><b>b)</b> Code of Ethics developed and placed on the ACBO website.</p> <p><b>c)</b> Ethics sessions offered at both Spring/Fall 2014 conferences and an Ethics keynote Session is on Spring 2015 program. Ethics training is to be planned for all future ACBO conferences.</p> <p><b>d)</b> CPE tracked, reported, and certificate awarded in Spring 2014 and Fall 2014.</p>

**2014-15 ANNUAL PLANNING ACTIVITIES AND ACTIONS**

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

<b>OBJECTIVES</b>	<b>2014-15 ACTIVITIES</b>	<b>ASSESSMENT</b>
<b>1)</b> Establish a process for review, enhancement and updating information on the directory semi-annually by the region representatives.	<b>a)</b> Maintain process for a current directory.  <b>b)</b> Delegate oversight to a Board member	<b>b)</b> Steve Crow, Region 10 Rep., appointed to review the website.
<b>2)</b> Encourage and support regional meetings throughout the year.	<b>a)</b> Encourage and support region meetings throughout the year.	<b>a)</b> Ann-Marie Gabel, Regional 8 Rep., has been holding the Southern California CBO meetings regularly, and Andy Suleski, former Region 1 Rep. and President Elect, has been holding the Northern California CBO meetings regularly.
<b>3)</b> Expand communications through regularly publishing articles in affiliate newsletters, and identify other possible options for increasing communications state-wide.	<b>a)</b> On-going continuous process; continue efforts thus far and improve and add other means of communication to undertake	<b>a)</b> Presentation at the CCLC Trustees Conference.
<b>4)</b> Strengthen operational working relationship with ACCCA	<b>a)</b> Review and update MOU in preparation for contract renewal	<b>a)</b> MOU up for renewal next year.

**2014-15 ANNUAL PLANNING ACTIVITIES AND ACTIONS**

**Goal IV:** Provide leadership and advocacy in finance, facilities, and administrative issues facing California community colleges

<b>OBJECTIVES</b>	<b>2014-15 ACTIVITIES</b>	<b>ASSESSMENT</b>
<p><b>1)</b> Continue to maintain and enhance existing ACBO linkages/relationships with other entities/organizations</p>	<p><b>a)</b> Continue to actively engage in legislative advocacy on financial affairs.</p> <p><b>b)</b> Continue to provide oversight and work with other organizations</p>	<p><b>a)</b> Letters of support and other work done on the STRS legislation.</p> <p><b>b)</b> Established operating guidelines in support of the State Chancellor efforts to create a Fiscal Advisory Workgroup of 13 CBOs representing the diversity of the 72 districts in the state system.</p> <p><b>b)</b> IEPI partnership on professional development initiatives.</p> <p><b>b)</b> DOF staff regularly attend the ACBO Board meetings.</p> <p><b>b)</b> IEPI Professional Assistance Teams to feature CBO representatives.</p>
<p><b>2)</b> Establish on-going relationship with ACCJC</p>	<p><b>a)</b> Maintain and enhance relationship with ACCJC</p>	<p><b>a)</b> ACBO Board members serving as accreditation advisors.</p> <p><b>a)</b> Regional reps assisting with getting a CBO on each accreditation team.</p>
<p><b>3)</b> Expand legislative advocacy relationship</p>	<p><b>a)</b> Identify key opportunities to impact legislative issues</p> <p><b>b)</b> Encourage testifying by Board and CBO members at legislative hearings</p> <p><b>c)</b> Co-host annual legislative mixer with ACCCA and CCLC</p>	<p><b>a)</b> CCLC legislative advocate invited to and regularly attends the ACBO Board meetings.</p> <p><b>a)</b> Letters of support provided to CCLC on key legislation impacting fiscal aspects of CCCs.</p> <p><b>c)</b> Co-hosted an annual legislation mixer as part of the Annual State Budget Workshop held each January with ACCCA and CCLC the last two years.</p>