



CACUBO

Central Association of College
& University Business Officers

Strategic Plan

2026-2028

Providing value through enhanced programming, business partnerships, and member engagement.

MISSION STATEMENT

CACUBO's mission is to support higher education business and finance professionals through development, networking, and ethical leadership.

VISION STATEMENT

Our constituents recognize CACUBO as the choice for professional development and our diverse institutions desire to be actively engaged.

VALUES STATEMENT

Integrity: CACUBO is committed to the highest standards of ethical behavior, honesty and trust.

Excellence: CACUBO is committed to delivering the highest quality and most relevant programs and services.

Innovation: CACUBO is committed to meeting our members' needs by continuously evolving our structure, programs and services through creativity and ingenuity.

Community: CACUBO is committed to building a diverse and inclusive community by valuing and leveraging members' backgrounds, talents and expertise.

Enrichment: CACUBO is committed to creating learning opportunities that appropriately balance intellectual and interpersonal experiences.

Strategic Pillars for 2026-2028

1. We will provide professional development content and formats that meet our constituents' needs.
2. We will ensure business partnerships provide excellent value for members and partners.
3. We will foster active and engaged individual and institutional members.

CACUBO Strategic Plan 2026-2028

Pillars	We will provide professional development content and formats that meet our constituents' needs.	We will ensure business partnerships provide excellent value for members and partners.	We will foster active and engaged individual and institutional members.
Outcomes	<ol style="list-style-type: none"> 1. We are the first stop for the educational content of our constituents. 2. The programming content we provide fulfills and exceeds the needs of our constituents. 	<ol style="list-style-type: none"> 1. Elevate the value proposition enabling business partners to maximize engagement and drive growth by unlocking exclusive access to Midwest college and universities. 	<ol style="list-style-type: none"> 1. Active participation (events/volunteers) by member institutions and individual members. 2. Attendance and engagement from every member institution. 3. Active volunteers.
Metrics	<ol style="list-style-type: none"> 1. Attendance growth at events (Recruitment). 2. Continued and recurring engagement of constituents at CACUBO events (Retention). 3. Satisfaction of attendees who attend our events measured through reviews of surveys (Satisfaction). 	<ol style="list-style-type: none"> 1. Increase exhibitor only partners moving to a sponsorship level. 2. Increase the number of new exhibitors and sponsors returning. 3. Increase the number of sponsors moving to next sponsorship level. 	<ol style="list-style-type: none"> 1. Institutional engagement from 80-90% member institutions. 2. CACUBO Merchandise (Swag) – Year 1 goal of 100 merchandise item sales. 3. Retainage – 95% of current member institutions retained.

Strategic Pillar #1: Programming/Professional Development: We will provide professional development content and formats that meet our constituents' needs.

Chair: Greg Sanial

Team Members: Nancy Combs, Susan Kraft Mann, Marty Mickey, Greg Sanial, Mike Volna, Angela Wolfgram

Outcomes:

1. We are the first stop for the educational content of our constituents.
2. The programming content we provide fulfills and exceeds the needs of our constituents.

Key Metrics:

1. Attendance growth at events (Recruitment).
2. Continued and recurring engagement of constituents at CACUBO events (Retention).
3. Satisfaction of attendees who attend our events measured through reviews of surveys (Satisfaction).

Strategies:

Year 1 (2026):

1. Create certificates or badges for professional development attendees.
2. Develop professional development tracks.
3. Survey constituents for what they want and then try to adapt.
4. Continue to evaluate pricing strategies for professional development.
5. Evaluate doing an online all-day CPE Conference (e.g., focused seminar, CFO roundtable seminar, top six rated sessions from annual conference).

Year 2 (2027):

1. Implement an online all-day CPE Conference.
2. Build targeted marketing strategies.
3. Consider developing a Higher Ed 201 series.

Year 3 (2028):

1. Assess progress and set year 3 strategies.

Action Plan (Year 1-2026):

Quarter 1:

1. Make CPE check-in questions at webinars pertinent to us as survey results, such as:
 - o Have you been to an annual conference?
 - o Do you prefer in person or virtual programming?

Quarter 2:

1. Discuss all online all-day CPE Conference.

Quarter 3:

1. Explore programming tracks with Programming Committee.
2. Add certificates and badges as part of the 2026 Annual Conference.
3. Continue to perform targeted surveys as the 2026 Annual Conference.

Quarter 4:

1. Execute strategies above.
2. Evaluate strategies and decide what is working and adapt as appropriate.

Quick Wins:

1. Survey Annual Conference attendees when they check in as to what we can do to improve.
2. Conduct similar quick surveys of attendees at all programming events.
3. Discuss discounting strategies with the Board in October.

Resources Needed:

1. Survey results.
2. Data on attendance at events by person broken down by person.

Strategic Pillar #2: Business Partners: We will ensure business partnerships provide excellent value for members and partners.

Chair: Steve Mandeville

Team Members: Bob Swanson, Mark Volpatti, Jeff Wilhelmi, Shari Mayer, Jill Yates

Outcomes:

1. Elevate the value proposition enabling business partners to maximize engagement and drive growth by unlocking exclusive access to Midwest college and universities.

Metrics:

1. Increase exhibitor only partners moving to a sponsorship level.
2. Increase the number of new exhibitors and sponsors returning.
3. Increase the number of sponsors moving to next sponsorship level.

Strategies:

Year 1:

1. Develop value proposition to business partners.
2. Develop business partner engagement plan for segments.
 - a. Segment Business Partners by market.
 - i. TIAA, Bank of America for example – high dollar, different approach.
 - ii. Husch, RubinBrown, Fresh Ideas – small dollar, interested in growing HE different approach.
 - iii. Non-financial BP – different approach.
 - iv. Introduce BP to who fits their market.
3. Educate members on business partner value.

Year 2:

1. Fully implement the Business Partner engagement plan.

Year 3:

1. Assess progress and set year 3 strategies.

Action Plan (Year 1):

Quarter 1:

1. Work with AEG to develop a marketing and promotional piece that conveys the value proposition including restructured tiers and opportunities.

Quarter 2:

1. Evaluate current and prospective business partners for those most likely to buy-in to our value proposition.
2. Develop business partner segments by solution.

Quarter 3:

1. Enhance listing of booths by solutions within the app.
2. Gather questions from attendees and provide list of business partners that can help.

Quarter 4:

1. Create business partner portal that will list solutions they provide.

Quick Wins:

1. Provide Business Partner Advisory Council summary of plan.
2. Create BP AC action items.
3. Refresh council participants.
4. Plan for post conference outreach with questions on why and how much for sponsorships.

Strategic Pillar #3: Membership Engagement: We will foster active and engaged individual and institutional members.

Owner: Katrina Yoakum, Clair Knapp

Team Members: Tracy Tamer, Jackie Kalan, Mark Haakenson, Brent Swanson, Adeeb Mozip

Outcomes:

1. Active participation (events/volunteers) by member institutions and individual members.
2. Attendance and engagement from every member institution.
3. Active volunteers – include constituency on list.

Key Metrics:

1. Institutional engagement from 80-90% member institutions (engagement defined as at least one member from an institution participating in a CACUBO event).
2. Swag – Year 1 goal of 100 sales.
3. Retainage – 95% of current member institutions retained.

Strategies:

Year 1:

1. Katrina to work with Jill to explore Swag vendors.

Year 2:

1. Use data for planning locations, targeting volunteers, and aligning programming.

Year 3:

1. Assess progress and set year 3 strategies.

Action Plan (Year 1):

Quarter 1:

1. Jill and Katrina – Identify Swag BP.
2. Develop RFP for external assistance (Technology and Marketing Committees work together).
3. Identify needed data. Ask other ACUBOs what data are they collecting and analyzing.
4. Update website to include Webinars on event calendar.

Quarter 2-4:

1. Pull 2021-2025 registration data for CACUBO in-person events (AC, Drive-In Workshops & Leadership Institute) and initiate data analysis.
 - a. Identify % of institutional member engagement.
 - b. Identify repeat attendees.
2. Analyze if Webinars or Drive-Ins have had impact on the Annual Conference.
 - a. Identify if any individuals who attended Annual Conference in the past have shifted to only Webinars or Drive-Ins.
 - b. Identify if any institutions who attended Annual Conference in the past have shifted to only Webinars or Drive-Ins.

Quarter 4:

1. Update website.
2. Data queries.
3. Lapsed membership data analysis.

Quick Wins:

1. Set up swag marketplace.

Resources Needed:

1. Data analysis – External assistance or volunteer.

Implementation

Implementing a strategic plan is more difficult than developing one. To successfully implement a plan, we need the following:

1. **Ownership:** A team will be assembled to implement each focus area. The team will have a chair who will be responsible for scheduling meetings, coordinating efforts of the team, and providing progress updates to the board.
2. **Regular updates:** Each team chair will provide a quarterly update to the board that includes accomplishments, progress, goals for the upcoming quarter(s), barriers, and other relevant information. All board meetings should include strategic direction updates, and the agenda will be aligned with the strategic goals.
3. **Focus:** To ensure success, teams need to identify those areas that will make the most positive impact. This is not a contest to accomplish the most tasks. Instead, teams are charged with creating return on investment for the time and resources spent on these initiatives.