|  |
| --- |
| Outcomes |
|  |
| Heads of School, Trustees, and other members of the leadership teams will perceive the strategic role the business officer plays in the financial and operational excellence in independent schools. |
|  |
| Sustain an active and engaged community with growth and retention of its members, active participation in programs, and opportunities to volunteer. |
|  |
| Providing a financial value proposition with benefits outweighing dues. |
|  |
| Solid and appropriately staffed management and team of volunteers |

|  |
| --- |
| Measurable Results |
| Continued increase in membership, participation, involvement, and satisfaction |
|  |
| Enhanced perception of the organization’s value as provided by feedback from member schools and related constituents |
|  |
| Maintaining the organization’s financial equilibrium by building reserves and achieving a fiscally sustainable model |
|  |

Mission Statement: Cal-ISBOA develops, delivers and promotes business and operational best practices to advance the business officer profession and support the operations of Independent Schools in California.

|  |  |
| --- | --- |
| Goal | Objective |
| Provide quality services to enhance the business office’s professional standard, its visibility within the organization and its support of each school’s mission. | 1. Provide data collection and sharing mechanisms to benchmark the financial and operational data of member schools and to create opportunities to share experience and knowledge among peers. 2. Offer opportunities for participation in programs that leverage the organization’s size and purchasing power. 3. Educate and inform on state specific regulations, laws and risks, by offering professional development training, mentorship, and services. |
|  |  |
| Raise awareness of the business office’s function within the independent school community | 1. Seek partnerships and collaboration with interdisciplinary independent school functional organizations. 2. Build alliances and strategic partnerships for educational and financial support 3. Insure the organization’s financial model can support its goals and objectives |
|  |  |
| Foster a membership community | 1. Provide opportunities for collegiality and fun to enhance member engagement 2. Provide regional functions to promote face to face connections |
|  |  |

*BACKGROUND: Cal-ISBOA is the Independent School Business Officers Association of California and is the largest regional organization in the nation which specifically serves the California independent school business officer. Its current membership is over 235 schools. It is governed by a 21 person Board, comprising 6 committees: Budget and Finance, Governance, Membership, Programming, Statistics and Strategic Planning.*

*The organization was originally founded as 2 separate geographical associations which consolidated in 2011.*

*Our success is based on a network of dedicated colleagues who collaborate, share knowledge and are supported with best in class professional development and services to advance the excellence of the independent school business office.*

*THE 2016 STRATEGIC PLAN is the first published strategic plan of the Cal-ISBOA organization and will serve as the five year plan, with annual reviews for our continued growth and service.*