



California Independent Schools  
Business Officers Association

# STRATEGIC PLAN 2022–2024

April 2022

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# WHO WE ARE

## MISSION

Cal-ISBOA fosters a thriving community of school business and operations professionals by building lasting connections, advancing best practices, and enabling members to serve their schools to the fullest.

## VALUES

***Inclusive:*** provide a welcoming forum for collaboration that reflects the diversity of our school communities, professional roles, perspectives, and lived experiences

***Collaborative:*** support each other as colleagues and partners to strengthen ourselves, our schools, and communities

***Strategic:*** partner with school leadership to ensure that decisions are based on timely, data-driven, and mission-centric professional development

***Accountable:*** facilitate the adoption of best practices, grounded in high ethical standards, as the essential foundation for our work

# STRATEGIC PRIORITIES – Introduction

**This plan provides a roadmap for Cal-ISBOA’s goals and future organized around three strategic priorities.**

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1  
**Member  
Engagement**

Cal-ISBOA members hold unique roles in their schools, specialized in expertise yet broad in functional oversight. To foster collegiality, levity, and lasting friendships, it is a core service of Cal-ISBOA to provide shared spaces and experiences for these independent school leaders.

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2  
**Member  
Support**

Cal-ISBOA is committed to providing all members with relevant, responsive, and actionable support. Cal-ISBOA will enhance members’ professional development and respond to emergent areas of interest and need through provision of training and organized access to resources and tools.

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3  
**Association  
Sustainability**

Cal-ISBOA exists to serve and represent the interests and needs of members within the larger independent school ecosystem. Stewarding Cal-ISBOA’s health and long-term viability requires strengthening our statewide impact and school reach with innovative systems and support structures.

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## STRATEGIC PRIORITIES – *Detail*

The following pages elaborate on each of the three strategic priorities with goals and supporting narrative. These strategic priorities are intended to guide planning and implementation over the next three years beginning in July 2022. The Cal-ISBOA Board of Trustees, staff, and/or appointed committees shall develop annual workplans at the start of each fiscal year describing action steps for the coming year and the mechanism by which progress might be evaluated. Board of Trustee meetings should regularly include a Committee-based assessment of work undertaken, resources needed, and alignment with then-current foci and emphases.

### **Priority 1: Member Engagement**

Cal-ISBOA members hold unique roles in their school, specialized in expertise and broad in functional oversight. To foster collegiality, levity, and lasting friendships, it is a core service of Cal-ISBOA to provide shared spaces and experiences for these independent school leaders.

### **Goals**

#### **1.1. Foster member connections and community as part of all that Cal-ISBOA undertakes**

As tightly integrated as Cal-ISBOA's members are in the operation and health of their schools, and as comprehensive as their scope of responsibility is, our members hold unique institutional roles. Gratifying, complex, impactful, they can also be weighty and challenging.

Cal-ISBOA recognizes the power and import of a professional network to celebrate achievements, share resources and knowledge, and even to offer commiseration when adversity mounts. In some respects, the moments, friendships, and relationships are what bring life to the profession and lasting value of membership. The strength and vitality of the member community should be paramount in our decision-making and central to each of our interactions and events.

## **1.2. Evaluate member activities, events, and communications to ensure continuous alignment with DEI principles**

Approved by the Board of Trustees in 2022, the [Cal-ISBOA Diversity, Equity, and Inclusivity \(DEI\) Principles and Standards](#) document and corresponding Planning Document, describe in detail the steps, responsibilities, and timeline by which the organization's DEI objectives are to be met. Consideration is given to how the association operates and how it is governed, as well as ensuring that members are provided with appropriate resources to effect positive change within their institutions. At their core, the DEI Principles and Standards recognize the extraordinary value that comes from differences of opinion, experience, and background, and the fundamental necessity that an organization be equally welcoming of and provide equal voice to all its subscribers. The DEI Principles and Standards also acknowledge the reality that we have previously fallen short in this regard, particularly for individuals from historically marginalized populations.

Fulfilling our strategic DEI goals will require action in broad areas such as how we communicate, plan, and grow but also tactical initiatives such as opportunities for those who follow “non-traditional paths” to the profession. Please refer to the [DEI Planning Document](#) for the timeline of actionable items.

## **1.3. Conduct outreach and recruitment to increase the number of member schools and prospective individual subscribers at schools**

Concomitant with DEI principles, the value and potential of the Cal-ISBOA member base is enhanced with robust, diverse membership. Connection points are more numerous, dialogue more informed, and sharing of knowledge and perspective enriched. Simultaneously, it is our desire to maintain a member organization that is personable, nimble in response to needs, and relevant in pursuit of our mission. In other words, growth in member schools and individual subscribers is essential, provided that the pace of growth does not erode the quality of what we do and the strong feeling of connectedness that we support.

Specific targets for member growth shall be identified by the Membership Committee, in consultation with the Executive Director and Finance Committee. Consideration is to be given to geography, grades served, secular/non-secular, day/boarding, enrollment, diversity, and coed/single gender.

While our original membership was comprised of schools' most senior finance professionals, we and our membership have benefitted from the addition of supporting staff members, such as those focused on accounting and payroll, as well as student enrollment, human resources and facilities. This strategic plan supports the continued addition of professional disciplines responsive to member interest and subject to Board approval. Important factors to consider are the evolution of our programs that new fields of membership would require, professional networks already available to those fields, and staffing and budgetary constraints.

## **Activities**

In pursuit of meaningful member engagement, consideration is to be given to:

- Supporting small membership gatherings and interactions
- Emphasizing peer networking and interpersonal exchanges as part of conference design
- Developing a mentor program (i.e., pairing of experienced members with those new to the profession and/or new to independent schools)
- Examining and reimagining member outreach and the welcoming of new members
- Developing and implementing recognition and celebratory events
- Redesigning association messaging and communication priorities, such as featuring training and topics that advance Cal-ISBOA's DEI Principles and Standards
- Supporting existing members in championing the value of Cal-ISBOA
- Crafting targeted outreach to potential new member schools
- Encouraging colleagues to regularly participate in association events and activities

The Membership Committee of the Board shall assume primary oversight for the above.

## **Measuring Progress**

Metrics for measuring progress and achievement are left to the discretion of the Committees, Executive Director, and Cal-ISBOA staff. Potential metrics include:

- Total # of member schools
- Member school retention rate
- # of new members added
- # of member contacts (a member school may have multiple contact persons)
- Email open rate
- Participation rates for a) registration and b) attendance at activities, webinars, and events

## **Priority 2: Member Support**

Cal-ISBOA is committed to providing all members with relevant, responsive, and actionable support. Cal-ISBOA will enhance members' professional development and respond to emergent areas of interest and need through provision of training and organized access to resources and tools.

### **Goals**

#### **2.1 Ensure members are supported in ways that enhance their expertise, professional satisfaction, and impact**

Cal-ISBOA has a long history of providing members with quality training as well as access to tools and resources that advance professional development. As part of its annual conference, Cal-ISBOA brings together members throughout the State to share ideas, hear dynamic speakers, and learn about new developments in the areas of school finance, human resources, facilities, and the workplace environment. In addition, Cal-ISBOA organizes training sessions and meetings of members throughout the year on a host of topics that are critical to the healthy, successful, and responsible operation of independent schools.

Cal-ISBOA will continue to focus on providing members with relevant, high quality professional support and training. Drawing on existing and potential partnerships, Cal-ISBOA is well positioned to leverage expertise and resources for its member base. Cal-ISBOA will also continue to build awareness about access to existing tools and resources.

Cal-ISBOA recognizes the critical resource of time. Our members are extraordinarily busy and involved in nearly every aspect of school life and operations. They must stay abreast of a complicated set of ever-evolving regulatory, legal, and compliance matters. Therefore, Cal-ISBOA's goal is to support members with professional development that is efficiently delivered, relevant to the challenges they face, and tailored to differentiated needs of our diverse membership.

#### **2.2 Continue to expand the portfolio of training, tools, and resources focused on member well-being and professional development**

The COVID-19 pandemic has accelerated a shift towards on-line professional development. The accessibility of virtual meetings and trainings meant that there were more opportunities for members to access Cal-ISBOA's portfolio of training, tools, and

resources. Technology has made communication and information access more convenient. The shift to virtual engagement reminded Cal-ISBOA about the importance of in-person gatherings that take full advantage of member interactions rather than function as pure content-delivery mechanisms. In the years ahead, Cal-ISBOA will continue to provide a mix of both online and in-person professional development opportunities.

Challenges like a global pandemic showcase the need for professional development tied to employee wellness and retention. Cal-ISBOA expects to place greater emphasis on training, resources, and tools designed to help with staff recruitment and retention, especially the fostering of workplace environments in which employees feel listened to and valued. Risk management and proactive scenario planning remain critical components of school operations and will continue to be featured training topics from which many members would benefit.

### **2.3 Build awareness about and resources for financial and operations career paths in independent schools**

Staff recruitment and retention are not new challenges for independent schools, but they have become more acute due to changes in the labor market and California's demographics. As such, we expect Cal-ISBOA to play a greater role in advancing and supporting workforce development issues. Cal-ISBOA can and should help its members learn about best practices and innovative approaches for developing and stabilizing career pathways into the business office.

Towards this end, Cal-ISBOA will be a resource to independent schools interested in diversifying the types of candidates who are interested in business and financial careers at independent schools. Cal-ISBOA will facilitate the infusion of new ideas and approaches to workforce recruitment and retention from other industries and sectors, with a secondary goal of allowing member schools to forge new relationships, or deepen existing ones, with local business, community, and postsecondary educational leaders. Cal-ISBOA's efforts will center on providing tools, resources, and training that proactively addresses workforce issues for independent schools.

### **Activities**

To ensure member satisfaction and support, consideration is to be given to:

- Examining and reimagining how best to promote interactivity and networking as part of in-person professional development
- Offering differentiated and tiered trainings to meet the needs of specific members based on experience and exposure to independent school environments



- Developing curated resource digests that compile relevant information for busy professionals
- Leveraging partnerships to provide access to timely and relevant information and resources
- Seeking out training and resources that accentuate employee wellness and well-being
- Encouraging colleagues to regularly participate in regional meetings and affinity groups
- Emphasizing workforce development issues and innovative approaches, particularly those tied to employee recruitment and retention

The Program Committee of the Board shall assume primary oversight for the above.

### **Measuring Progress**

Metrics for measuring progress and achievement are left to the discretion of the Committees, Executive Director, and Cal-ISBOA staff. Potential metrics include:

- Participation rates for a) registration and b) attendance at trainings, webinars, and other professional development events
- Number of annual conference participants overall and disaggregated by member characteristics
- Participation rates in meetings of regional and affinity groups
- Addition of new webinar and/or program topics, particularly those outside of the typical Business Office technical disciplines

## **Priority 3: Association Sustainability**

Cal-ISBOA exists to serve and represent the interests and needs of members within the larger independent school ecosystem. Stewarding Cal-ISBOA's health and long-term viability requires strengthening our statewide impact and school reach with innovative systems and support structures.

### **Goals**

#### **3.1 Extend and formalize collaboration with peer associations and key partners**

Cal-ISBOA has a long history of working with two comparable associations – the Philadelphia Area Independent School Business Officers Association (PAISBOA) and the Mid-South Independent Schools Business Officers (MISBO). The partnerships and interaction with these multi-state, regional associations have been mutually beneficial. Past and present collaboration have suggested new ideas for member benefits, shaped member surveys and benchmarking, and prompted discussions about revenue development. Cal-ISBOA will continue to work with PAISBOA and MISBO to share resources and expand opportunities benefiting our combined memberships.

Within California, Cal-ISBOA is also working with other associations who serve as leaders within the independent school space – California Association for Independent Schools (CAIS) and the California Teacher Development Collaborative (CATDC). Working together, this triad of associations encompasses the three largest independent school stakeholders – Heads of School (CAIS), Business Office and other staff professionals (Cal-ISBOA), and faculty (CATDC). Closer connections and coordination of effort, an outcome desired by all three parties, will undoubtedly help solidify these relationships, amplify their respective messages and initiatives, and help independent schools thrive. Comparable consideration should be extended to other professional associations and organizations within and beyond independent schools as needed in areas such as membership diversification, programmatic growth, state regulatory issues, and ongoing evolution of business and facilities officers' responsibilities.

#### **3.2 Explore opportunities for revenue growth consistent with Cal-ISBOA's mission**

To strengthen Cal-ISBOA's fiscal health, it is critical to shift from a reliance on member dues to more diversified sources of association revenue. Over the past five years, member dues have averaged 65% of total association revenue. This figure is higher than comparable peer associations and reflects Cal-ISBOA's historical focus on peer networking rather than revenue enhancements.

In the next three-year period, Cal-ISBOA will investigate the efficacy of various revenue sources including (but not limited to) purchasing partnerships, subscription models of curated resources, premium training, and other revenue growth opportunities. Cal-ISBOA will aim to both boost overall revenue and to diversify revenue streams. At the same time, Cal-ISBOA is committed to evaluating each revenue opportunity in relation to its historic strengths and core mission.

In addition to the direct levers on revenue growth described above, Cal-ISBOA is cognizant of the fact that there are indirect ways to sustain the association. One of these indirect levers is our commitment to DEI, an implicit acknowledgement of the inherent benefits of a diverse membership and Board, as well as the need for greater inclusion of marginalized voices and perspectives. By embedding DEI principles into its work, Cal-ISBOA is demonstrating responsiveness to member needs and interests, as well as making a compelling case for how the association provides a vehicle for thoughtful and meaningful collective work. As a first step, Cal-ISBOA has developed its set of DEI Principles and Standards to guide our efforts in the coming years. A DEI Task Force will continue to guide and monitor progress on DEI implementation.

### **3.3 Develop systems to respond to internal staffing needs and succession planning**

To provide relevant engagement and support to its members, Cal-ISBOA relies upon a dedicated staff, currently comprised of two full-time individuals. In the past five years, membership has grown by 31 schools (12%). At the same time, depth of membership (i.e., the number of individual members from each member school) has nearly doubled, increasing from 565 member contacts to more than 1,050.

Looking forward, it may become necessary for Cal-ISBOA to evaluate staffing needs to meet the statewide geography of the association, breadth of initiatives currently being contemplated, and the needs of growing membership. Because Cal-ISBOA has expanded its reach to include financial, human resources, and facilities professionals, there may be a demand for staff with different skills and competencies. Similarly, some of the areas for potential revenue development (see Goal 3.2 above) could also necessitate a need for staff with different backgrounds. Cal-ISBOA will also formally undertake succession planning, particularly as the exit of either of its current staff members would represent a significant loss of institutional knowledge and expertise.

## Activities

In pursuit of association sustainability, consideration is to be given to:

- Joint speaking and member professional development sessions, hosted by CAIS, CATDC, and Cal-ISBOA
- Incorporation of ideas and innovations from the wider association world
- Assessment of subscriptions to curated digests of resources as a means of revenue development
- Examination of purchasing partnerships and consortia
- Evaluate what services might be offered or programs enabled with additional Cal-ISBOA staff; model financial implications
- Development of a contingency and/or formal succession plan for Cal-ISBOA staff
- Expanding Board recruitment and retention to represent the diversity of California independent schools

The Finance and Governance Committees of the Board shall assume primary oversight for the above.

## Measuring Progress

Metrics for measuring progress and achievement are left to the discretion of the Committees, Executive Director, and Cal-ISBOA staff. Potential metrics include:

### Fiscal/Revenue

- Increase total revenue
  - Membership dues as percentage of revenue
- Increase alternative (non-dues) sources of revenue
  - Sponsorship funds
  - Conference registration
  - Other revenue sources
- Reexamine target level of fiscal reserves and, as applicable, deliberate budgeting mechanisms to add to the reserves
  - Reserve as percentage of revenue and/or operating expenses

### DEI

- Increase Board diversity - geography, school enrollment, school type/grade span, gender, and race/ethnicity

# Acknowledgements

We would like to extend our thanks to the Cal-ISBOA Board of Trustees and those who contributed their time, wisdom, and perspective to the strategic planning process.

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