

CORE STRATEGIES, GOALS & PRIORITY ACTIONS

Core Strategy: **Strategic Growth**

Goal: **CSMFO will leverage and invest resources to ensure the organization supports its volunteer efforts to forward the mission, vision and values.**

Priority Actions:

Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
<p>a. New technology</p>	<p>1. Membership Database</p> <ul style="list-style-type: none"> a. Technology Committee Members assigned to database workgroup b. Follow progress of working group and update committee/board as necessary <p>2. Listserv</p> <ul style="list-style-type: none"> a. Draft implementation plan b. Research software solution c. Present to board for adoption <p>3. Tele-conferencing</p> <ul style="list-style-type: none"> a. Complete testing of tools b. Create matrix of pros/cons c. Draft recommendation for larger-scale adoption d. Present to board <p>4. Workflow management</p> <ul style="list-style-type: none"> a. Complete testing of tools b. Create matrix of pros/cons c. Draft recommendation for larger-scale adoption d. Present to board 	<p>Database Working Group/Technology Committee</p>	<ul style="list-style-type: none"> 1. December 2017 2. <ul style="list-style-type: none"> a. first half of 2017 b. second half of 2017 c. 2018 conference 3. <ul style="list-style-type: none"> a. first half of 2017 b. fall 2017 c. November 2017 d. December 2017 4. <ul style="list-style-type: none"> a. second half of 2017 b. winter 2017-18 c. spring 2018 	

			d. summer 2018	
b. Survey needs, evaluate growth opportunities	<ol style="list-style-type: none"> 1. Get a list of non-renewing members from SMA 2. Identify questions for survey 3. Send out survey 4. Get a list of 2016 & 2017 conference attendees from SMA 5. Analyze and identify gaps of attendees year over year 	Membership Committee	<ol style="list-style-type: none"> 1. April 2017 2. April 2017 3. April 2017 4. August 2017 5. August 2017 	<ol style="list-style-type: none"> 1. Completed 2. Completed 3. Completed <p>A survey was sent out in April 2017, and with very few responses, the questions in the survey were narrowed down (from 16 to 3) and sent out again in May. However, that also resulted in only a handful of responses. Instead of re-doing and sending out another survey, the Committee focused on reaching out to non-members under Core Strategy Member Engagement Objective #1, as this provides an avenue of outreach to non-renewing members within the non-member cities.</p> <ol style="list-style-type: none"> 4. December 2017 5. December 2017
c. Branding/Outreach/Promote CSMFO	<ol style="list-style-type: none"> 1. Continue to publish the CSMFO Magazine through 2017 to strategically brand and promote CSMFO. 2017 Publication months: Jan, Feb, Mar, May, Jul, Sep, Nov 2. Identify standardized opportunities to support chapters and committees in outreach efforts. <ol style="list-style-type: none"> a. Participate in bi-monthly chapter chair calls b. Interface with committee chairs in bi-monthly committee chair calls 3. Draft policies to ensure consistent messaging <ol style="list-style-type: none"> a. For Magazine b. Use of logos and for email communications 	Communications Committee	<p>As indicated by publication dates</p> <p>By September, 2017</p> <p>By April, 2017</p>	<ol style="list-style-type: none"> 1. Magazines have been published; attempts have been made to incorporate a Chapter focus in each issue 2a – need to get on calendar 2b – participate 3. Draft policies prepared. Logos & email communication targeted to go to Board at the October meeting

			By Sept, 2017	
d. Expand/enhance program administrative support and infrastructure	<ul style="list-style-type: none"> 6. Poll committee chairs to determine if there are additional administrative needs above and beyond what can be handled by volunteer members 7. Based on results of poll, work with committees to draft scope of services/cost proposal 8. Turn scope of services proposal over to Admin Com for review and presentation to Board 9. Incorporate additional budget requests into proposed 2018 budget 10. Poll chapters on impact of increased administrative support 11. Analyze poll results and determine if adjustments should be made to administrative support services for chapters 12. Scope and cost additional services, as appropriate 13. Incorporate into 2019 budget 	Executive Committee/ Administration Committee (additional support from Technology Committee)	<ul style="list-style-type: none"> 1. May 2017 2. July 2017 3. August 2017 4. October 2017 5. 2018 6. 2018 7. 2018 8. 2018 	2017 action items completed. Program Committee established new contract with SMA to provide admin support (approved at August Board Meeting).
e. Enhance internal communication – chair calls, collaboration	<ul style="list-style-type: none"> 1. Solicit ideas, suggestions and recommendations from leadership on ways to enhance internal communications 2. Consolidate input from leadership and distribute 3. Based on input, develop recommendations for Board review 4. Seek Board approval for implementation in 2018 5. Evaluate effectiveness of changes every 6 months in 2018 and 2019 	Executive Committee (additional support from Technology Committee)	<ul style="list-style-type: none"> 1. August 2017 2. September 2017 3. December 2017 4. December 2017 5. 2018 6. 2018 & 2019 	2017 items are on track. Committee Chairs have been meeting bi-monthly with the President, and the Past President is meeting regularly with Chapter Chairs. Solicitation on effectiveness began in September.
f. Evaluate and improve internal communication	<ul style="list-style-type: none"> 1. Solicit ideas, suggestions and recommendations from leadership in ways to enhance internal communications 2. Consolidate and distribute 	Executive Committee (additional support)	<ul style="list-style-type: none"> 1. December 2017 2. 2018 3. 2018 	Executive Committee has had discussions on board agendas and status reports. Will continue

<p>s – Board Meeting agendas, status reports from committees</p>	<p>3. Develop recommendations for Board review 4. Seek Board approval for implementation in 2019 5. Evaluate effectiveness in 2019</p>	<p>from Technology Committee)</p>	<p>4. 2018 5. 2019</p>	<p>conversation and solicit input from leadership on schedule.</p>
<p>2. Develop a “60th” Logo</p>	<p>DONE!</p>	<p>Executive Committee/President</p>		
<p>3. Develop Comprehensive Strategy on Fees and Dues (Revenues)</p>	<p>1. Compile data on fees charged on all courses and Chapter meetings. 2. Survey and compare class fee structure to other organizations such as WFOA, OGFOA, CMTA 3. Survey if other organizations have member vs non-member pricing 4. Make recommendation on pricing strategy 5. Membership dues structure: survey and compare dues structure to other organizations and make recommendation on pricing strategy (re-visit dues structure every 3-5 years)</p>	<p>Membership Committee</p>	<p>1. 2018 2. 2018 3. 2018 4. 2018 5. 2018</p>	
<p>4. Formalize Chapter Structures</p>	<p>1. Establish succession plans for Chapters 2. Define standard policy for transition and introduction of Chapter Chairs 3. Generate standardized evaluations for Chapter meetings 4. Establish speakers bureau Chapter list and ratings list for reference 5. Develop Tool Kit for Chapter leadership and meetings management 6. Create Chapter Effectiveness Committee?</p>	<p>Chapter Chairs, led by Past President Staff</p>	<p>2018</p>	
<p>5. Engage Past Presidents</p>	<p>1. Establish Past Presidents Advisory Committee (potential oversee DSA)</p>	<p>Past President to chair</p>	<p>2018</p>	

CORE STRATEGIES, GOALS & PRIORITY ACTIONS

Core Strategy: **Member Engagement**

Goal: **CSMFO will respond to our members’ needs, increase active participation and promote strategic growth.**

Priority Actions:

Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
<p>1. Formulate outreach plan to target potential members (88 cities)</p>	<p>1. Identify the targeted cities 2. Map cities to see if there are any geographic patterns to identify support/help from active member agencies (e.g. see what chapters non-member cities belong to) 3. Identify outreach efforts (e.g. offering webinars which are free unless CPE certificate is required, using chapter revenues to hold free meetings for potential members at their agencies)</p>	<p>Membership Committee</p>	<p>1. November 2017 2. November 2017 3. November 2017</p>	<p>1. Completed 2. Completed 3. Completed/Ongoing</p> <p>After the membership listing was updated earlier in the year, there were 84 cities identified that do not have members in CSMFO. The committee’s strategy was to work with these cities’ respective chapters to send out a letter that lists out membership benefits and offers the non-member cities a free chapter meeting so they can experience first-hand some of the benefits CSMFO provides. For cities that belong to inactive chapters, the strategy was to work with neighboring active chapters. Concurrently, letters with an invitation to join CSMFO were sent out by President Corbett and Membership Chair Reyna to the California attendees at the GFOA Annual Conference who went to the President’s reception and who were not CSMFO members.</p> <p>To date, these combined outreach efforts resulted in 6 new members and another</p>

				8 cities who accepted the invitation to attend the next chapter meeting in their respective chapters.
2. Refine volunteer utilization plan and appreciate and recognize volunteers	<ol style="list-style-type: none"> 1. Develop policy to formally recognize Chapter and Committee Chairs to create uniformity across CSMFO. 2. Make recommendation on volunteer appreciation plan (e.g. standard recognition letter, special CSMFO pin/t-shirts/plague on "milestone" 5-, 10-, etc. years of service) 	Membership Committee	<ol style="list-style-type: none"> 1. 2018 2. 2018 	
3. Refine volunteer utilization plan and appreciate and recognize volunteers	<ol style="list-style-type: none"> 1. Issue RFQ for Survey Firm 2. Execute contract 	Administration Committee	<ol style="list-style-type: none"> 1. May 2017 2. July 2017 	<ol style="list-style-type: none"> 1. Completed 2. Completed
4. Conduct comprehensive member survey to determine priorities	<ol style="list-style-type: none"> 1. Work with SMA to identify survey questions (do members want more webinars? More in-person trainings? What topics? Chapter meetings? Etc.) 2. Send out survey 	Membership Committee	<ol style="list-style-type: none"> 1. 2019 2. 2019 	
5. Develop student engagement plan	<ol style="list-style-type: none"> 1. Update CSMFO brochure and gather other CSMFO materials and swag to pass out to students 2. Get booth at "career night"/"meet the firm" at college campuses, or attend university's finance society meetings 3. Recommend and implement engagement plan (e.g. offer free attendance to chapter meetings, hold chapter meetings at local universities to attract students) 	Membership Committee	<ol style="list-style-type: none"> 1. 2018 2. 2019 3. 2019 	<ol style="list-style-type: none"> 1. The brochure has been updated and will be printed in time for the 2018 Conference.
6. Develop orientation package for new and existing members	<ol style="list-style-type: none"> 1. Develop standard welcome letter for new members 2. Set up special event(s) for first time conference attendees 	Membership Committee	<ol style="list-style-type: none"> 1. July 2017 2. 2018 3. 2018 	<ol style="list-style-type: none"> 1. December 2017

	3. Create designated "hotspots" for new members to meet with Chapter Chairs at annual conference			
7. CSMFO should add value without advocating	<ol style="list-style-type: none"> 1. Develop guidelines for the Board regarding advocacy: <ol style="list-style-type: none"> 1. Define responsibilities 2. Develop policy statements 2. Engage our most experienced members 	Professional Standards	2018	
8. Develop plan for student engagement	<ol style="list-style-type: none"> 1. Formulate formal program to visit colleges and universities (do presentations) 2. Set up on campus for CSMFO meetings (chapters, other?) 3. Contact MPA/Finance/Econ/MBA departments/programs and offer to attend/present 4. Offer training on delegation/mentoring skills 5. Develop CSMFO Leadership Academy 	Student Engagement Task Force - NEW	2018	

CORE STRATEGIES, GOALS AND PRIORITY ACTIONS

Core Strategy: **Professional Development**

Goal: **CSMFO will deliver the highest quality training and expanded educational opportunities to further develop the knowledge and skills of finance professionals at all levels throughout California.**

Priority Actions:

Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Expand CSMFO core training to ensure foundational skill sets	1. Professional Standards Working Group members are creating inventories in six different topic areas. Members need time to research existing resources and develop a comprehensive inventory.	Professional Standards & Recognition Committee	1. November 2017	<p align="center">2. May 2018</p> The Professional Standards Working Group has developed a listing of standards for each topic. The Working Group needs to develop this information into a workable tool that can be used by the membership as a whole.
1. Expand CSMFO core training to ensure foundational skill sets	1. Identify new subjects for courses (e.g. debt management, fixed assets, and treasury). If overlap with other professional organizations, seek feedback from the	Career Development Committee	1. December 2017	1. Survey Monkey sent to membership week of 9/25/17 to ascertain level of interest in new topics for training.

	<p>Board and possibly develop training partnerships.</p> <p>2. Fundamentals of Tax Revenues</p> <p>3. Fundamentals of Fees, Rates & Charges</p> <p>4. Successful Skills for Finance Directors (South & North in 2017)</p> <p>5. Developing Successful Supervisory Skills</p> <p>6. Introduce new courses</p>		<p>2. South in 2017 (Odd Years) & North in Even</p> <p>3. North 2017 (preconference) & South in 2018</p> <p>4. Scheduling in 2017</p> <p>5. 2018 – Preconference Session?</p> <p>6. 2018 & 2019</p>	<p>2. Completed – West Basin</p> <p>3. Completed as Preconference Session in 2017</p> <p>4. Confirmed as a Preconference Session in 2018</p> <p>5. 2017 Dates: 9/28 & 11/16; 2018 Dates: 1/11</p>
<p>2. Leverage technology to deliver content</p>	<p>1. Develop a strategy for alternative service delivery options. Work with consultants and other interested committees. Includes enhanced functionality of the listserv</p> <p>2. Test alternative delivery options.</p>	<p>Technology Committee/Career Development Committee</p>	<p>1. December 2017</p> <p>2. December 2018</p>	<p>1. Awaiting direction from Technology Committee for video-based committee meeting options and for Quick Hit video improvement</p>

	3. Expanded roll-out of alternative delivery options.		3. December 2019	
3. Develop and copyright training materials as appropriate	<p>1. Evaluate content of Introductory course to ensure alignment with Intermediate course. Incorporate CSFMO style guide. If curriculum changes needed, request assistance from instructor or other professional.</p> <p>2. Core course evaluation plan to ensure quality of delivery and content. CDC member to attend at least one of each of the courses offered.</p> <p>3. Continue process of obtaining feedback on all core courses.</p>	Career Development Committee	<p>1. December 2018</p> <p>2. December 2017</p>	<p>1. Committee to work on finding consultant(s) to develop course objectives and material development. CDC will ensure objectives align with corresponding core courses.</p> <p>Need funding in 2018</p> <p>2. Completed in 2016: Fiscal Policies & Fundamentals of Tax Revenues; Completed in 2017: Introduction, Intermediate, Investment Accounting, Supervisory Skills, & Weekend Training; To be completed in 2018: Skills for Finance Directors</p> <p>CDC to develop a form for Committee members to use as starting in 2018 for in-person class evaluations</p> <p>3. SMA continues to send independent course surveys (in addition to instructor-provided surveys). Surveys continue to be very positive.</p>

<p>3. Develop and copyright training materials as appropriate</p>	<p>1. Issue RFQ for attorney Services 2. Execute contract</p>	<p>Administration Committee</p>	<p>1. December 2017 2. March 2018</p>	
<p>4. Develop focused “quick hits” on technical topics accessed from any device (aka ‘Ted Talks’)</p>	<p>1. Develop questions and utilize CSMFO technology for interviews</p> <p>2. Develop material and utilize CSMFO technology for presentation</p>	<p>Professional Standards & Recognition Committee (with CDC assistance)</p> <p>Accountability with CDC</p>	<p>1. June 2017 2. June 2017</p>	<p>1. Completed in 2017: Transportation Funding (M. Coleman)</p> <p>In Progress in 2017: New Issue Bond Pricing (PFM) & New Debt Disclosures (Tim Kirby prepared a quick hit on how local governments can comply with SB 1029.)</p> <p>Need funding in 2018.</p> <p>2. Need to develop brand-consistent video quality (Technology Committee)</p>
<p>5. Strategize on developing Student Mentorship Program</p>	<p>1. Identify, target and recruit mentors.</p> <p>2. Create the Mentorship Program.</p> <p>3. Identify, target and recruit mentees.</p> <p>4. Identify recruitment strategies and work with the Membership Committee.</p>	<p>Career Development Committee</p> <p>This goal has now been transferred to the Membership Committee; CDC will maintain the Coaching Program</p>	<p>1. June 2017</p> <p>2. December 2017</p> <p>3. December 2017</p> <p>4. June 2017</p>	