

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:

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.				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Formalize Chapter Structures	1. Define standard policy for transition and introduction of Chapter Chairs 2. Generate standardized evaluations for Chapter meetings	Past President	2020	
2. Engage Past Presidents	Establish Past Presidents Advisory Committee with purpose and goals	Margaret Moggia/John Adams	2020	Board Item for January 2020
3. Update Bylaws	Review/Revise Bylaws	Working Group	January 2020	Draft Bylaws Prepared
4. Professional Services	1. Communications Committee support 2. Other Committee support	1. Communications Committee 2. President/ Committee Chairs	December 2019 for Board proposal 2020	Board Approved December 2019
5. Knowledge Base	Knowledge Base Transition from Listserve- Continue training members on utilizing KB capabilities	Technology Committee	2020	“How to” materials in progress
6. Succession Planning	1. Define pathways to leadership (chapter chairs, committee chairs, board, officers) 2. Establish succession plans for Committee leadership 3. Establish succession plans for Chapter leadership	Executive Committee/PPAC President & Committee Chairs Past President & Chapter Chairs	2020 2021 2021	Pending outcome of Goal 2 in January
7. Management services agreement	Scope of services and timing/process for possible contract renewal or organizational restructure	Executive Committee/Ad Hoc	October 2020	Ad Hoc group to provide update in January 2020

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8. Long-term financial planning	Establish a financial strategy that includes identifying what membership dues should pay for, non-dues revenue streams and strategies for sustaining the current and growing level of services	Ad Hoc Group?	2021	

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Core Strategy: **Member Engagement**

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

Priority Actions:

Core Strategy: Member Engagement				
Goal: CSMFO will respond to our members' needs, increase active participation and promote strategic growth.				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Student engagement committee structure	Develop various documents in support Student Engagement as a standing committee <ol style="list-style-type: none"> 1. Appoint committee leadership 2. Recruit committee members 3. Update policy and procedures manual 4. Update Roles & Responsibilities document 5. Create committee handbook 	<ol style="list-style-type: none"> 1. President 2. Committee Chair 3. Admin/Staff 4. Admin/Staff 5. Student Engagement Committee 		January 2020 January 2020 June 2020 June 2020 December 2020
2. Engage small and large agencies	Establish a strategy to target and involve small and large agencies that do not currently participate in CSMFO activities	Membership	2020	

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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:

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.				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Develop and copyright training materials as appropriate	Evaluate content of Introductory course to ensure alignment with Intermediate course. Incorporate CSMFO style guide. If curriculum changes needed, request assistance from instructor or other professional.	Career Development Committee	December 2020	Intermediate course we have purchased the materials from Susan Mayer. A refresh to the materials is underway and will be used for two upcoming Intermediate Governmental & Financial Reporting course. Beginning Course materials have been reviewed and flows effectively into the intermediate course. Need to contact Ahmed to see if CSMFO purchase and own. Need funding in 2020 for the purchase of these materials.
2. Create and execute succession transition plan for Michael Coleman	<ol style="list-style-type: none"> 1. Discuss with Coleman his plans for 2021/beyond 2. Provide public policy guidance to all members 	<p>President</p> <p>President</p>	<p>March 2020</p> <p>June 2020</p>	
3. Develop CSMFO Certification Program	<ol style="list-style-type: none"> 1. Develop RFP to develop coursework for a certification program 2. Board Approve and Contract Execution 3. Program Development Plan 	Working Group	TBD	Board approved item to be brought back at January meeting for further discussion

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<p>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.</p>				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
<p>4. Create easy-to-use references for members of current course offerings</p>	<p>1. Evaluate effectiveness of all current core courses to determine whether to continue offerings</p>	<p>Career Development</p>	<p>2020</p>	
	<p>1. Develop a catalog of core courses with a cadre of qualified instructors</p>		<p>2021</p>	
<p>5. Create opportunities for one-on-one member interactions</p>	<p>Renew/revitalize mentor/coaching program. "Leadership Exchange"?</p>	<p>Membership/ PPAC</p>	<p>2020</p>	

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Core Strategy: **Communications**

Goal: **CSMFO will improve internal and external communications to promote transparency and inclusion.**

Priority Actions:

Core Strategy: Communications				
Goal: CSMFO will improve internal and external communications to promote transparency and inclusion.				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Increase Internal Communications	Develop Executive Committee roles and responsibilities, to include guidelines on internal communications (which items at the Executive Committee are shared with the Board and when; which Board items shared with committees/chapters; etc.)	Executive Committee	2020	
	Provide Committee minutes to the Board in meeting packets	All Committees	2020	
2. Increase External Communications	Establish standard reporting for chapters (conference updates, significant CSMFO initiatives, membership renewals, etc.)	Past President & Chapter Chairs	2020	
	Implement "state of the association" regular updates in the CSMFO News (Quarterly? Monthly?)	Communications Committee Chair	2020	
3. Formalize Board, Committee and Chapter Orientation	Develop orientation for new Board members, Committee and Chapter leaders	Executive Committee/PPAC	February 2021 (Annual Conference)	