

CORE STRATEGIES, GOALS & PRIORITY ACTIONS

Core Strategy: **Organizational Sustainability**

Goal: **CSMFO will leverage and invest resources to ensure the long-term sustainability of the organization.**

1. Operations				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Create a committee structure that optimizes leadership opportunities	-Review/revise committees/committee structure	Develop new Ad Hoc led by Board Member	Committee appointed by March 2021; Recommendation from ad hoc due by October 2021	
2. Provide public policy guidance to all government members (not just cities)	-Research and identify ways to provide greater guidance for counties and special districts	Professional Standards	Recommendation by October 2022	
3. Update operations to conform with modern technologies	-Evaluate best long-term use of CSMFO app and market to members, particularly students.	Technology with support from CDC	April 2022	
4. Appropriately structure staffing and operations for the next 5-10 years	-Develop RFP that includes a scope of services for projected as well as current needs	Current Ad Hoc	Due by May 2021	

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2. Fiscal Sustainability				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Prioritize the financial health of the association	<ul style="list-style-type: none"> -Consider establishing fiscal guiding principles -Analyze diversification of revenue streams -Develop long-range forecasting to address fiscal sustainability -Revise Administration Committee responsibilities as necessary to address enhanced ongoing fiscal planning and oversight 	Develop new Ad Hoc led by Board Member	Committee appointed by March 2021; Initial report/recommendations to Administration Committee due by August 2021	
2. Ensure membership dues appropriately contribute to operations	<ul style="list-style-type: none"> -Research possibility of different dues structure (e.g., like GFOA) -Establish a membership dues policy to address increasing costs of operations and keep up with inflation 	Administration Committees with input from Membership	August 2021 (for implementation for 2023 dues (11/2022)) June 2022	
3. Determine program profitability	-Consider apportioning costs (including staff time) to program expenses to provide an overall picture of each program's fiscal health	Career Development Committee	August 2021; if staff time to be apportioned, include in 2022 budget	

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3. Leadership Development				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Ensure success of volunteer leadership	-Develop an orientation presentation for Board members, chapter leadership, committee leadership, League policy committee representatives	Develop new Ad Hoc led by Past President	October 2021	
	-Establish method for onboarding new leaders		December 2021	
2. Provide opportunities for future leaders	-Develop a way to incorporate all member types into leadership positions	Develop new Ad Hoc led by Board Member	Committee appointed by July 2021; Recommendations from ad hoc due by June 2022	
	-Develop systems to better support future leaders			
3. Recognize volunteers	-Develop annual volunteer recognition	Recognition Committee	Fall 2021	Ideas to be brought to Board in the fall in preparation for the Annual Conference

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Core Strategy: **Back to Basics**

Goal: **CSMFO will focus its efforts and resources on its core mission and vision.**

4. Membership Engagement				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Engage all members	-Develop strategy to engage commercial members	Executive Committee	August 2021	
2. Ensure avenues for member-to-member connectivity	-Test Cohort program -Consider continued virtual engagement activities -Develop a one-on-one coaching/mentoring system	Membership Committee Career Development Committee	Dec 2021 Ongoing through 2021 October 2021	
3. Communicate appropriately with the membership and external partners	-Reevaluate goal and purpose of CSMFO News -Analyze reach of CSMFO News to internal and external parties	Communications Committee	August 2021 September 2021	
4. Provide for consistent leadership and coordinated efforts among the chapters	-Generate standardized policies for chapter meetings -Generate “state of the association” regular updates for reporting out at chapter meetings	Past President with support from Chapter Chairs	June 2022 June 2021	
5. Create an incentive for membership	-Develop member v. non-member pricing policies -Ensure membership in CSMFO has value beyond what nonmembers receive	Membership Committee with support from Admin	June 2021 May 2022	

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5. Professional Development				
Goal/Objective	Action Plan & Deliverable	Responsible Parties	Target Dates	Progress
1. Reduce administrative overhead of career development programs	-Investigate Learning Management Systems.	Technology with support from CDC	June 2021	
2. Recognize top performers in the field of local government finance	-Work with GFOA to develop a California-centric add-on to their CPFO program	Career Development Committee	End of 2022	
3. Leverage cadre of instructors among all training media	-Assist with identifying topics/speakers for chapter meetings	Career Development Committee with support from chapter chairs	October 2021	
	-Develop a database of speakers and their associated topics		Feb 2022	
4. Provide the training that members want	-Analyze core course offerings and amend as necessary	Career Development Committee	Initial recommendation by August 2021; then, ongoing	