

CSMFO Strategic Action Plan Summary 2014-2016

Completed

- Institute a Chair/Vice Chair structure
- Develop/implement sponsorship guidelines for Chapter meetings
- Reach out to remote geographical areas to gauge interest in Chapter involvement/activities
- Explore options to ease the administrative burden of Chapter meeting registration/payment collection
- Develop informational tools to introduce members to volunteer leadership opportunities
- Assign committee chairs responsibility to identify, recruit and recommend their successor
- Assign responsibility to each committee to identify, recruit and appoint at least one new committee member annually
- Consider revising policies to allow for commercial member participation
- Maintain a balanced operational policy that meets or exceeds targeted reserves
- Strengthen the structure of the Chapter network by encouraging each Chapter to have a Chair and a Vice Chair; and explore options to ease the administrative burden
- Increase contract with Michael Coleman to allow lower-cost Chapter participation
- Evaluate the dues structure and make recommendations on changes, if warranted
- Refine call for sessions to solicit general membership ideas
- Establish a "Finance 101" track in conjunction with Annual Conference
- Create marketing plan for the one-on-one Coaching Program to increase participation
- Creating materials and content to facilitate the success of the one-on-one Coaching Program

To Be Completed

- Develop individual committee handbooks as a supplement to the Administrative Handbook to formalize transfer of information from one chair to the next (note: due by 2/1/17)
- Appoint individual(s) or an ad hoc committee as a point of contact for communications for SMA (note: on Board agenda for September 2016)
- Promote educational opportunities through regular updates (note: on Board agenda for September 2016)

Ongoing

- Retain members through annual renewal process
- Expand the number of individual members within existing member agencies
- Increase Chapter Chair outreach
- Encourage volunteers for specific Chapter tasks

- Incorporate volunteer leadership messaging into new member orientation in conjunction with Annual Conference
- Encourage all committees to have members in addition to officers
- Ensure the strategic plan is integrated into the CSMFO budget cycle and budget allocations reflect strategic priorities adopted by the Board of Directors
- Review marketing brochure and update if necessary to market to public agency decision makers
- Communicate the value and position of CSMFO to outside stakeholders (continue relationships with GFOA, LCC)
- Develop a strategy to recruit 10 new agencies
- Executive Committee approval of new Chairs and Vice Chairs
- Develop ideas to increase and engage the number of individual members within existing member agencies
- Develop a consistent organization-wide communication strategy
- Redistribute program content from Annual Conference throughout the year through Chapter meetings and webinars
- Invite State Controller to the Annual Conference (as CSMFO guest?)
- Continue to increase the number of webinars and expand the size of the webinar library
- Evaluate need for additional live courses throughout the year
- Establish an inventory of existing professional standards and certifications to determine if gaps exist

For Consideration in 2017-2019 Plan

- Develop/implement committee membership application process, with selection by committee leadership (note: volunteer form implemented; is this different than an “application”?)
- Develop/implement a committee member evaluation process to provide input to the incoming president; ask for interest in other committees and/or committee leadership
- Consider formalizing the role of past presidents and past committee/chapter chairs to retain knowledge and foster continuity
- Streamline goals in future three-year plans to focus just on priority items
- Invest in a survey instrument that queries the membership on key data points, and commit to using the data collected to sustain the organization (note: Survey Monkey account secured; develop structure for querying the membership?)
- Expand communication methods to reach beyond the membership
- Survey membership to determine if there are needs CSMFO is not meeting (at large and within Chapters)
- Develop non-member database in inactive Chapters
- Gather and analyze data on current student members and develop a plan to promote the profession
- Evaluate alternatives for communications and how they complement current messaging (social media, Magazine, website, etc.)
- Consider database and listserv/forum upgrades
- Education succession planning