

Goals Adopted for 2011



Results from February 22, 2011, Workshop

facilitated and reported by

Don Maruska, MBA/JD, Master Certified Coach

CSMFO's Key Success Factors

- Commitment of membership and leadership.
- Quality participants and quality programs.
- Planning for goals and steps to achieve them.
- Strong professional reputation.
- Continuity with long-term leaders.
- Committee structure and leadership.
- Good balance between what volunteers give and what they receive.
- Strong work ethic among members.
- Friendly and open meetings.
- Chapters as a local or regional point of connection.

Strategic Objectives for 2011-2013

A. Training and Delivery

1. Training and development
2. Boosting Chapters as a focal point and delivery vehicle

B. Membership and Participation

3. Marketing CSMFO membership to non-participating agencies
4. Expanding pool of CSMFO volunteers

C. Financial Stewardship

5. Identifying and reviewing cost-saving efficiencies
6. Increasing revenues to support member benefits

Goals for 2011

A. Training and Delivery

Strategic Objective	Goal for 2011	Follow Up Roles & Resources	Key Factors for Success
<p>1. Training & professional development: pursue alternative delivery and collaboration with other orgs. (GFOA, CalCPA, CMTA, PARMA, etc.) to broaden audience and leverage resources</p>	<ol style="list-style-type: none"> 1. Research opportunities available elsewhere. 2. Market CSMFO to other organizations and link with others, e.g. follow up with CDIAC. 3. Think strategically about where and how to deliver services to expand audiences, e.g. extension of fiscal policies webinar to regional on-site training. 4. Explore concept of a “CSMFO University” for a catalogue of courses and potential revenue stream. 	<ul style="list-style-type: none"> • Career Development to lead • Create liaisons with other organizations • Coordinate with Thomas Fil connections with CMTA • Use Resource Matrix as a tool 	<ul style="list-style-type: none"> • Learn more about one another • Clearly identify alternatives • Provide right training programs • Buy in from other organizations • Agreements

Goals for 2011

Strategic Objective	Goal for 2011	Follow Up Roles & Resources	Key Factors for Success
2. Boosting Chapters as focal point and delivery vehicle	<ol style="list-style-type: none"> 1. Complete “census” or survey within Chapters of agency membership and participation. 2. 100% of Chapters holding events. 3. Offer choices of focused programs across Chapters for consistency and quality (e.g. GFOA training, GASB update, etc.) and ask each Chapter to pick at least one to implement. 	<ul style="list-style-type: none"> • Past-President and Board members • Ask Chapter Chairs to contact agencies within Chapter for participation; invite non-members; cover topics of shared interest (e.g. parking tickets), include special districts • Chapter Chair support program • Roll out of CSMFO-wide theme (e.g. new website) to stimulate interest • Tap retired members; partner with vendors 	<ul style="list-style-type: none"> • Personal commitment of Board • Seed funding to renew/boost a Chapter’s vitality • Be creative about alternative or virtual delivery

Goals for 2011

B. Membership and Participation

Strategic Objective	Goal for 2011	Follow Up Roles & Resources	Key Factors for Success
3. Marketing CSMFO membership to non-participating agencies	<ol style="list-style-type: none">1. Complete data base (including non-participants).2. Clarify target audience.3. Contact 25 agencies without members to determine interests in joining.	<ul style="list-style-type: none">• Membership Committee*• SMA list and Chapter Chairs to implement• Career Development information about resources available to serve needs• Offer clear tracks at conferences?• Review membership drive	<ul style="list-style-type: none">• Data base of finance directors in CA• Clarify target: mid and senior finance managers (clear value proposition)

Goals for 2011

Strategic Objective	Goal for 2011	Follow Up Roles & Resources	Key Factors for Success
<p>4. Expanding pool of CSMFO volunteers (clear direction, menu of opportunities, manageable tasks)</p>	<ol style="list-style-type: none"> 1. Send questionnaire to Committee Chairs and Chapter chairs to identify their needs. 2. Develop menu of volunteer needs and opportunities for members to get engaged. 3. Ask members at renewal for their interests. 4. Each Board member and Chapter Chair identify 1 volunteer. 5. Invite to go to a Chapter meeting as a start. 	<ul style="list-style-type: none"> • Executive Director (SMA) to manage • Executive Committee to groom next leaders • Committee Chairs and Board Liaisons • Mini News • Chapter meetings • Email blasts • Conference booth – raffle, prize 	<ul style="list-style-type: none"> • Personal contacts • Easy to engage • Clear and rewarding roles to play

Goals for 2011

C. Financial Stewardship

Strategic Objective	Goal for 2011	Follow Up Roles & Resources	Key Factors for Success
5. Identifying and reviewing cost-saving efficiencies (e.g. leverage paid professionals, go green)	1. Identify and implement 3 cost-saving measures.	<ul style="list-style-type: none">• SMA identify options• Admin Committee to decide• Host Committee	<ul style="list-style-type: none">• Balanced budget

Goals for 2011

Strategic Objective	Goal for 2011	Follow Up Roles & Resources	Key Factors for Success
<p>6. Increasing revenues to support member benefits (conference contribution, sponsorships, advertising, non-member pricing, charge for special benefits)</p>	<ol style="list-style-type: none"> 1. Identify and evaluate potential revenue models and feasibility (pricing options, tiering, etc. with what-if analysis). 2. Analyze if conference pricing could contribute more to CSMFO budget. 3. Clarify what membership fee covers. 	<ul style="list-style-type: none"> • Executive Committee to review and lead • Host Committee • SMA develop options for membership fees with Membership Committee 	<ul style="list-style-type: none"> • Clear value proposition for the revenues • Effective cost recovery • Sustained or increased participation

Ideas for Communicating and Reporting on the Goals

Leadership

- Executive Committee Champions for each of the three clusters of goals
- Agenda package coverage of progress on goals

Membership

- President's membership message
- Tab on website
- MiniNews coverage