

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. New Technology	1. Evaluate User Experience a. Zoom b. Branded Email c. Poll Everywhere d. Present to board	Database Working Group/Technology Committee	August 2019	
2. Formalize Chapter Structures	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. Expand Chapter Tool Kit to include Chapter Meeting Effectiveness template	Chapter Engagement Working Group, led by Past President Staff	2018 (#1-5) 2019	
3. Engage Past Presidents	1. Establish Past Presidents Advisory Committee (potential oversee DSA) with purpose and goals	Past President to chair	2019	
4. Update Bylaws	1. Review Bylaws 2. Consider retaining legal counsel for thorough review	Administration	August 2019	
5. Hire a professional production manager/editor for CSMFO Magazine	Define scope Execute Contract	Communications Committee (contract to Admin)	TBD	
6. Technology Committee Expansion	Increase number of members on the Technology Committee	Technology	Feb 2019	

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7. Database Training	Establish “how to” documents for the new database; share and post to members.	Staff	March 2019	

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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. Refine volunteer utilization plan and appreciate and recognize volunteers	1. Develop policy to formally recognize Chapter and Committee Chairs to create uniformity across CSMFO.	Membership Committee	1. 2018	We're doing this; do we need a formal policy?
2. Conduct comprehensive member survey to determine priorities	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	1. 2019 2. 2019	
3. Develop student engagement plan	1. Get booth at "career night"/"meet the firm" at college campuses, or attend university's finance society meetings 2. Recommend and implement engagement plan (e.g. offer free attendance to chapter meetings, hold chapter meetings at local universities to attract students) 3. Formulate formal program to visit colleges and universities (do presentations) 4. Set up on campus for CSMFO meetings (chapters, other?) 5. Contact MPA/Finance/Econ/MBA departments/programs and offer to attend/present	Membership Committee Student Engagement Working Group	1. 2019 2. 2019	

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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
4. CSMFO should add value without advocating	1. Develop guidelines for the Board regarding advocacy: -Define responsibilities -Develop policy statements -Engage our most experienced members	Advocacy Working Group	2018	Guidelines completed. Next steps?

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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. Establish CSMFO Resource Room	1. Professional Standards members are creating inventories in six different topic areas. Members need time to research existing resources and develop a comprehensive inventory.	Professional Standards	TBD	May 2018 Update 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.
2. 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 Board and possibly develop training partnerships. 2. Introduce new courses throughout the State including courses particular to special districts / government enterprise funds	Career Development Committee	1. 2019 2. 2019	Continual evaluation of new courses

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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>3. Offer training on delegation/mentoring skills</p>			
<p>3. Develop and copyright training materials as appropriate</p>	<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>Career Development Committee</p>	<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 2019</p> <p>2. Evaluation plan complete. CDC member to attend courses – TBD.</p> <p>CDC to develop a form for Committee members to use as starting in 2018 for in-person class evaluations</p>
<p>5. Develop and copyright training materials as appropriate</p>	<p>1. Issue RFQ for attorney Services</p> <p>2. Execute contract</p>	<p>Administration Committee</p>	<p>1. TBD</p> <p>2. TBD</p>	
<p>6. Develop focused “quick hits” on technical topics accessed from any device</p>	<p>1. Develop questions and utilize CSMFO technology for interviews, decide on future quick hit topics</p>	<p>Professional Standards & Recognition Committee (with CDC assistance)</p>	<p>TBD</p>	<p>Need to decide how to execute on quick hit videos</p> <p>Need funding in 2019</p> <p>1. Need to develop brand-consistent video quality (Technology Committee)</p>

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(aka 'Ted Talks')	2. Develop material and utilize CSMFO technology for presentation	Accountability with CDC		
8. Create and execute succession transition plan for Don Maruska	1. Identify/define scope of work 2. Conduct RFP 3. Develop transition timeline 4. Execute contract	CDC (contract to Admin)	1. March 2019 2. June 2019 3. Sept 2019 4. October 2019	
10. Create and execute succession transition plan for Michael Coleman and consider a similar service for Special Districts (county already has CSAC?)	1. Identify/define scope of work 2. Conduct RFP 3. Develop transition timeline 4. Execute contract	Admin Committee	1. March 2020 2. June 2020 3. Sept 2020 4. October 2020	
5. Develop CSMFO Leadership Academy – should be renamed to the CSMFO Certification	1. Develop RFP to develop coursework for a certification program 2. Board Approve and Contract Execution 3. Program Development Plan		1. 2. 3.	Certification Program scope had been discussed at the May 2018 Board meeting and will now focus on course development.