

Strategic Planning for 2012



October 6, 2011, Workshop Results

facilitated 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.

Key Success Factors (cont'd)

- Fun conferences
- Financial strength
- Fabulous webinars and CPE credit opportunity
- Strong educational content at conferences
- Networking and help among members
- Flexibility and innovation
- Support from commercial members
- Strong history and culture with respect for the organization
- Good management support

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

Hopes for 2011-2012

- Promote and advocate profession more effectively—underscore value of our profession – respect and worth
- Continue to help membership develop and learn
- Growth in attendance at Chapter meetings and people connect and support one another
- Increase membership in counties and special districts and value to the profession
- Develop positive news for profession
- Get members more involved in leadership of CSMFO
- Continue progress in membership growth and service
- Advocate for local government funding sources
- Sustain quality of educational sessions
- Provide information and guidance through webinars, list servs, etc.
- Determine future of Legislative Seminar
- Support profession through participation in Chapters to be role models and inspire next generation – reach out to engage non-participants

Hopes for 2011-2012

- Explore other options for Chapter leadership to stimulate and sustain activity
- Engage small districts and help them to perform professionally
- Maintain and grow participation in training
- Find solutions to geography and time for participation in Chapter activities
- Continue to weather the storm and share activities and results
- Increase involvement of up and coming future leaders in CSMFO and getting them involved earlier in their careers
- Build on successes
- Fill leadership roles in Chapters and boost participation
- Develop and grow future leaders of the organization, engage them
- Share inspiration and motivation with others—help others see the value
- Find ways to support finance professionals as they take on other roles
- Support growth of members—continue to be a catalyst for establishing and modeling professional standards and solutions – evolve to contribute more
- Continue dedication to results for ourselves, CSMFO, and the profession

Results for 2011; Targets for 2012

A. Training and Delivery

| Strategic Objective | Goals for 2011 | Results | Opportunities for 2012 |
|---|---|---|---|
| <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"> * Targeted areas of distinctive value for CSMFO and pointing members elsewhere (e.g. debt issues) where appropriate * Added Fiscal Policies regional workshop * Implemented all-webinar training programs with hot-topic calls * Evaluated participation and needs for Beginning and Introductory courses— regional, webinars? * Discussed opportunities with CDIAC and CMTA * Began exploring CSMFO University with UC Davis program and other partners | <p>Career Development</p> <ol style="list-style-type: none"> 1. Determine appropriate content and delivery approaches for existing programs – Beg., Intro., Leg. Seminar 2. Share links on Training page 3. Refresh the resource matrix and expanded skill set needed 4. Develop a portfolio of services 5. Identify new career development needs and alternative delivery methods 6. Consider seed funding or sponsorships to support training needs 7. Increase focus on growth of leadership skills 8. Continue to explore models for sustainable, quality training 9. Increase outreach to educational institutions |

Results for 2011; Targets for 2012

| Strategic Objective | Goals for 2011 | Results | Opportunities for 2012 |
|---|---|--|---|
| 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"> * Completed Chapter call with ~75% participation and varying levels of activity and commitment * Tracking every Chapter having a meeting in 2011 * Working on catalogue of Chapter topics with leads on speakers | Past President and Board-Chapter Liaisons <ol style="list-style-type: none"> 1. Build upon initiatives from 2011 and continue implementation 2. Engage retirees to support Chapters – “Range Rider” idea 3. Develop “buddy” program for successful Chapters to mentor aspiring Chapters 4. Explore alternative delivery, e.g. video links 5. Review geographical scope of Chapters – redistrict, right-size 6. Target quality topics and access available funding 7. Explore re-establishing Chapter Chair breakfast at conference 8. Engage Board leaders in Chapters |

Results for 2011; Targets for 2012

B. Membership and Participation

| Strategic Objective | Goals for 2011 | Results | Opportunities for 2012 |
|---|---|--|--|
| <p>3. Marketing CSMFO membership to non-participating agencies</p> | <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"> * Completed data base * Targeted audience * Prepared draft letter to address cities, counties, and special districts | <p>Membership Committee to work with SMA to develop plan and present to Executive Committee—develop model for implementation and test (review at Mini-Summit in February)</p> <ol style="list-style-type: none"> 1. Address membership structure and resolve by 2012 Annual Conference 2. Highlight unique value proposition for finance professionals within counties and special districts—need to have draws at chapter and conference –focus on training value (e.g. water budget-based billing) 3. Establish membership goals for 2012 by type (cities, counties, and special districts) 4. Develop a campaign to win engagement and membership 5. Consider link with Chapter and “buddy” program – letter, phone call, sponsor Chapter meeting, include topics at Chapter and conference |

Results for 2011; Targets for 2012

| Strategic Objective | Goals for 2011 | Results | Opportunities for 2012 |
|--|---|---------------------------|--|
| <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. | <p>* Limited progress</p> | <p>Nominating Committee to develop plan for building future leadership for CSMFO</p> <ol style="list-style-type: none"> 1. Develop people and get more people involved 2. Pinpoint organizational leadership—need champion plus a group to work on this topic 3. Past President to develop questionnaire 4. Share stories of value of involvement with up and comers 5. Post Committee and Chapter meeting schedules, agendas, and notes for others to join meetings (“lurk before you leap”) and archive them |

Involvement Opportunities

Committees

Career Development: general involvement, set up local/regional events

Professional Standards/Recognition: new members to train on better budget and CAFR documents, check box for reviewing 1 document/year on membership renewal, network of high quality professionals

Membership: in-person contacts with non-members

Administration: more members, job shadow (call or committee activity), financial statement review, service contract review, variety

Technology: input and general participation, social media—fit for CSMFO, testing with LinkedIn

Annual Conference: help out at conference with work and set up

Involvement Opportunities (cont'd)

Chapters

Central Valley: need co-chair, help with marketing the meetings through outreach calls

South Bay: logistics—welcoming, signing in, system for sending notices

San Gabriel: outreach person to call people and invite them to events, co-chair

All: helpful networkers, welcomers, outreach people, tap commercial members as needed

Share topics and results with other chapters—capture information and report back through SMA for other chapters to benefit and add to their programs

Use social media—Facebook, etc. – to share results—start by highlighting CSMFO web site

Need to groom people to be great Chapter Chairs

Results for 2011; Targets for 2012

C. Financial Stewardship

| Strategic Objective | Goal for 2011 | Results | Targets for 2012 |
|--|--|---|--|
| <p>5. Identifying and reviewing cost-saving efficiencies (e.g. leverage paid professionals, go green)</p> | <p>1. Identify and implement 3 cost-saving measures.</p> | <p>* Went green on conference packet – savings ~\$10,000 * Exploring other options (e.g. membership booklet) to leverage technology, etc. * Expenditures have declined (result of projects completed, etc.)</p> | <p>Host Committee and SMA</p> <p>1. Explore opportunities to reduce conference expenses, e.g. AV costs, locations</p> <p>Executive Committee</p> <p>2. Alternative contracting (e.g. multi-year contracts)</p> |

Results for 2011; Targets for 2012

| Strategic Objective | Goal for 2011 | Results | Opportunities for 2012 |
|---|--|---|--|
| <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"> * Experimented with CPE fee * Brought Intermediate Training in-house and increased revenue contribution to CSMFO * Adding Fiscal Policies workshop on for fee basis * Addressing topic of conference contribution * Deciding about membership fee structure (add net revenues?) | <p>Executive Committee</p> <ol style="list-style-type: none"> 1. Develop guiding principles for budget (e.g. revenue model, expenditure model, cost recovery, reserve model, membership benefits) 2. Resolve issue of annual conference contribution <p>Administration</p> <ol style="list-style-type: none"> 3. Determine appropriate level of reserves and use of reserves 4. Identify revenue opportunities <p>Membership</p> <ol style="list-style-type: none"> 5. Consider creation of foundation or voluntary contribution opportunities for members (e.g. next gen initiatives) <p>Career Development Committee</p> <ol style="list-style-type: none"> 6. Develop cost and revenue models for programs and examine opportunities to recover costs |

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