

CALIFORNIA SOCIETY OF MUNICIPAL FINANCE OFFICERS

Our Vision

CSMFO is the preeminent resource for promoting excellence in government finance.

Our Mission

The California Society of Municipal Finance Officers serves all government finance professionals through innovation, collaboration, continuing education and professional development.

Our Guiding Values

We value and respect our members as we live by and carry out the following values.

Integrity

We believe in and adhere to honest and ethical decision making while displaying good character and sound judgment.

Competency

We recognize the importance of obtaining and mastering the requisite skills, knowledge and experience to enable finance professionals to perform their jobs at a high level.

Commitment to Public Service

We believe our members should give back to their agencies' and the profession.

Transparency

We recognize the importance of openness, accountability and honesty to enhance the public trust.

Creating a Positive Legacy

We believe in collaboration, teamwork and developing leaders who share information, grow their skills and mentor others.

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:

1. Evaluate and invest in:	
a. New technology	Database Working Group/Technology Committee
b. Survey needs, evaluate growth opportunities	Membership Committee
c. Branding/Outreach/Promote CSMFO	Communications Committee
d. Expand/enhance program administrative support and infrastructure	Executive Committee/Administration Committee (additional support from Technology Committee)
e. Enhance internal communication – chair calls, collaboration	Executive Committee (additional support from Technology Committee)
f. Evaluate and improve internal communications – Board Meeting agendas, status reports from committees	Executive Committee (additional support from Technology Committee)
2. Develop a “60th” Logo	Executive Committee/President
3. Develop Comprehensive Strategy on Fees and Dues (Revenues)	Membership Committee

CORE STRATEGIES, GOALS & PRIORITY ACTIONS

Core Strategy: **Member Engagement**

Goal:

CSMFO will respond to our members' needs, increase active participation and promote strategic growth.

Priority Actions:

1. Formulate outreach plan to target potential members (88 cities)	Membership Committee
2. Refine volunteer utilization plan and appreciate and recognize volunteers	Membership Committee
3. Conduct comprehensive member survey to determine priorities	Membership Committee
4. Develop student engagement plan	Membership Committee
5. Develop orientation package for new and existing members	Membership Committee

CORE STRATEGIES, GOALS AND 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.

Priority Actions:

1. Expand CSMFO core training to ensure foundational skill sets	Career Development Committee/Professional Standards & Recognition Committee
2. Leverage technology to deliver content	Technology Committee/Career Development Committee
3. Develop and copyright training materials as appropriate	Career Development Committee/Administration Committee
4. Develop focused “quick hits” on technical topics accessed from any device (aka ‘Ted Talks’)	Professional Standards & Recognition Committee
5. Strategize on developing Mentorship Program	Career Development Committee