

Major CSMFO Goals for 2010

Results of Strategic Planning Session, October 1, 2009

| Action Objectives | Follow-Up Roles and Resources | Ideas and Comments |
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| <p><i>1. Training and Professional Development</i></p> <ul style="list-style-type: none"> a. Review survey results and develop plan for 2010 b. Evaluate idea of certification for para professionals c. Provide CPEs to support members' CEU needs and provide recognition for completion of training d. Explore expansion of more convenient access to GFOA training and testing | <p>President-Elect Scott Johnson</p> <p>Career Development Committee</p> <p>Leverage other groups e.g. CAPO, CMRTA, PARMA, CMTA</p> | <ul style="list-style-type: none"> • Expand webinars, webcasts • Explore para-professional training to boost skills and knowledge as well as involvement, e.g. payroll, purchasing, project mgmt., federal grant reporting [need Fin. Dir. leadership or mentoring]; consider PARMA model of certification and training and track at conference to support certification • Survey Fin. Dirs. for interest in outline of para-professional training and certification |

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| <p>2. <i>Organizational Vitality</i></p> <p>a. Enhance marketing of profession and benefits of membership in CSMFO</p> <p>b. Develop succession planning for CSMFO organizational leadership and ways to engage retirees productively</p> | <p>President Ronnie Campbell</p> <p>Membership Committee; “Pipeline” group, GFOA Review article</p> <p>Executive Committee and Past Presidents Group</p> | <ul style="list-style-type: none"> • Explore work-study opportunities with universities • Consider making CPE credit eligibility contingent on membership in CSMFO • Explore group membership rates for agencies • Clarify roles of Board members, senior advisors, and liaisons • Develop “governance” handbook • Mentor new leaders |
| <p>3. <i>Strategic Relationships</i></p> <p>a. Continue to pursue CSMFO-CMTA collaboration</p> <p>b. Strengthen links with League of CA Cities</p> <p>c. Examine relationship with GFOA and opportunities to contribute to and guide direction of policy</p> <p>d. Cross-link professional development opportunities</p> <p>e. Continue support for enhanced role and effectiveness of Chapters</p> | <p>Past President Thomas Fil</p> <p>Executive Committee; Thomas Fil</p> <p>Executive Committee</p> | <ul style="list-style-type: none"> • Be proactive on policy direction; e.g. tax reform, State budget • Clarify roles of liaisons and communication with membership • Establish strategic perspective • Strengthen link with CA GFOA representatives |

Continuing objectives

- Complete website redesign to enhance functionality for members and integration

Technology Committee

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| <p><i>Continuing objectives</i></p> <ul style="list-style-type: none">• Complete website redesign to enhance functionality for members and integration | <p>Technology Committee</p> | |
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