

Illinois Government Finance Officers Association (IGFOA) Strategic Plan 2011-2016

Our Mission: IGFOA promotes excellence in government finance.

Our Thrusts: Three to Five Year Priorities

1. Deliver training and communication using various technologies.
2. Increase participation in IGFOA and develop future IGFOA leaders.
3. Promote the profession and grow the IGFOA membership.
4. Continue IGFOA's successful programs and build on them for future successes.

Our Goals (Annual* Priorities) and Rocks (Actions taken quarterly to achieve Goals)

*first year goals cover remainder of FY11 through FY12 and quarters include:

Quarter	Timeframe
3FY11	January - March 2011
4FY11	April - June 2011
1FY12	July - September 2011
2FY12	October - December 2011
3FY12	January - March 2012
4FY12	April - June 2012
ongoing	Continues in all quarters

1. Raise awareness of IGFOA and energize its members.

Measure Success by:

- a. Not cancelling any training classes for lack of volunteers
- b. No Executive Board or Committee chair vacancies
- c. Increase membership by at least 2% annually.
- d. Increase attendance at IGFOA events
- e. Increase special district membership by 2% (currently 19% of govt members are from special districts)
- f. Publish at least two articles in IML and IAPD magazine

Rock	Date
Call for proposals for training presentations	3FY11
Review past marketing tactics and develop marketing protocol	4FY11
Develop list of targeted non-members	3FY11
Publish testimonials from leaders to encourage volunteerism	4FY11, 1FY12, 2FY12, 3FY12
Market training programs	3FY11, 4FY11, 1FY12, 2FY12
Articles published in IML magazine	4FY11, 2FY12
Share strategic plan and strategic planning survey results with IGFOA members	4FY11
Post IGFOA volunteer vacancies on Jobline	4FY11
Have current members personally invite non members to join	4FY11
Update and maintain a list of volunteers that will teach core training seminars	1FY12
Proposal to Board for governance structure changes	2FY12
Article published in IAPD magazine	1FY12
Develop on-line volunteer training program	1FY12
Recognize volunteers at Annual Conference	1FY12
Invite non members to chapter events free/discounted one time	1FY12
Get chapters to provide lists of non members attending their events for follow-up	1FY12
Provide volunteer toolkit and encourage volunteers to organize breakfasts/lunch for non members	1FY12
Develop IGFOA bucks program to encourage members to participate in IGFOA activities/events	1FY12

2. Complete a successful transition to CM Services, Association Partnership Company.

Measure Success by:

- a. IGFOA financial procedures and operations transitioned
- b. Identify and implement four areas where CM can help IGFOA
- c. Calculate savings and/or increased revenue from partnership
- d. Successful implementation of all periodic processes including fiscal year end and budget

Rock	Date
Complete transition plan	3FY11
Prepare 2012 budget in conjunction with strategic plan	4FY11
Board evaluations	2FY12

3. Enhance real-time data sharing (online forums).

Measure Success by:

- a. More new postings on online forums
- b. More responses and more immediate responses to postings
- c. More page views of online forums
- d. Number of times items are pushed to members by IGFOA
- e. Participation in revenue survey
- f. More and newer online documents

Rock	Date
Evaluate current online forum technology and determine if changes should be made	3FY11
Roll out online revenue survey	4FY11
Push items out to members regularly	4FY11, 1FY12
Active call for fresh documents/materials	1FY12
Identify and develop a core group of authors for content development and to respond to comments	4FY11
Develop Member on-line forum "How to" instructions	1FY12

4. Develop a succession plan for IGFOA’s Legislative Committee chair.

Measure Success by:

- a. New leader(s) in place
- b. New committee members

Rock	Date
Create links to other organizations’ legislative websites	3FY11
Create list of potential committee chair candidates	4FY11
Create job description for legislative committee chair	3FY11
Post openings on IGFOA Jobline	4FY11
Send job description to short list and gauge interest	4FY11

5. Begin to plan a mentor program to help orient new members and future leaders.

Measure Success by:

- a. No volunteer positions empty
- b. Sufficient nominees to fill positions annually

Rock	Date
Create list of interested future leaders	3FY12
Create opportunities for different membership segments to get together	2FY11
Develop a profile for IGFOA leaders	3FY12

6. Develop and publish an Annual Training Plan and deliver training to members.

Measure Success by:

- a. Continue to update training plan
- b. Increase attendance at training programs
- c. Seminars not cancelled due to lack of attendance
- d. Offer 100 hours of training programs per year

Rock	Date
Encourage members to submit proposals for training sessions	3FY11,4FY11,1FY12,2FY12
Identify hot topics throughout the year	3FY11,4FY11,1FY12,2FY12
Survey members and special districts regarding training wants and needs	4FY11
Survey members and special districts regarding where they get training and for what	4FY11
Annually review and update core courses being offered	2FY12
Coordinate with related organization so training programs offered are not duplicated	2FY12
Publish annual training plan for the following year	2FY12
Identify instructors for training programs	2FY12

IGFOA Strategic Plan 2011-2012 Initiatives

Strategic Goal/Rock	Quarter Start*	Measure Success by	Status	Committee(s)	Notes	Volunteer Kudos
Raise awareness of IGFOA and energize its members						
Call for proposals for training presentations	3FY11	Not cancelling any training classes for lack of volunteers	complete	Career Development	on-line form; need to publicize more and work on access for volunteers	Brian Caputo, Kim Auchstetter
Review past marketing tactics and develop marketing protocol	4FY11	Increase membership 2% and increase attendance	not started	Membership/ Career Development/ Conference/ Chapters		
Develop list of targeted non-members	3FY11	Increase membership 2%, inc special districts	in progress	Membership		
Publish testimonials from leaders to encourage volunteerism	4FY11		not started	Executive Board		
Market training programs	ongoing	Increase attendance at IGFOA events	in progress	Career Development/ Conference		
Articles published in IML magazine	4FY11	Publish at least two articles	not started	Membership		
Share strategic plan and strategic planning survey results with IGFOA members	4FY11	Increase membership by at least 2% annually	in progress	Executive Board	presented to Membership Committee and Downstate Board; scheduled for TARC and South Metro	
Post IGFOA volunteer vacancies on Jobline	4FY11	Not cancelling any classes for lack of volunteers; No Board or Committee chair vacancies	in progress	All	posted ad-hoc Members Exchange Team openings	
Have current members personally invite non members to join	4FY11	Increase membership by at least 2% annually	not started	Membership		
Update and maintain a list of volunteers that will teach core training seminars	1FY12	Not cancelling any training classes for lack of volunteers	not started	Career Development		
Proposal to Board for governance structure changes	2FY12	No Executive Board or Committee chair vacancies	not started	Executive Board		
Article published in IAPD magazine	1FY12	Increase membership 2%, inc special districts	in progress	Membership	IMRF article planned for IAPD	Elliott Becker, Bob Lewis, Anjali Vij, Lynda Given
Develop on-line volunteer training program	3FY12	Not cancelling any training classes for lack of volunteers No Executive Board or Committee chair vacancies	not started	Executive Board		

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Strategic Goal/Rock	Quarter Start*	Measure Success by	Status	Committee(s)	Notes	Volunteer Kudos
Raise awareness of IGFOA and energize its members, con't						
Recognize volunteers at Annual Conference	1FY12	Not cancelling any training classes for lack of volunteers No Executive Board or Committee chair vacancies	not started	Executive Board		
Invite non members to chapter events free/discounted one time	1FY12	Increase membership by at least 2% annually	in progress	Membership	Downstate offered discount	
Get chapters to provide lists of non members attending their events for follow-up	1FY12	Increase membership by at least 2% annually	not started	Membership		
Provide volunteer toolkit and encourage volunteers to organize breakfasts/lunch for non members	1FY12	Increase membership by at least 2% annually	not started	Membership		
Develop IGFOA bucks program to encourage members to participate in IGFOA activities/events	1FY12	Increase attendance at IGFOA events	in progress	Career Development/ Chapters/ Membership	Downstate offered discount	
Complete a successful transition to CM Services						
Completion of transition plan	3FY11	IGFOA financial procedures transitioned	in progress	Executive Board		Financial transition Scott Bordui, Scott Anderson, Tim Sloth and Scot Brandon
Prepare 2012 budget in conjunction with strategic plan	4FY11	Calculate savings and/or increased revenue from partnership	complete	Executive Board	refer to FY12 Budget	Tom Kuehne, Sue Stanish, Scott Bordui
Board evaluations	2FY12	Identify and implement four areas where CM can help IGFOA	not started	Executive Board		

IGFOA Strategic Plan 2011-2012 Initiatives

Strategic Goal/Rock	Quarter Start*	Measure Success by	Status	Committee(s)	Notes	Volunteer Kudos
Enhance real-time data sharing						
Evaluate current online forum technology and determine if changes should be made	3FY11	More new postings, more immediate responses, more page views of online forums	in progress	Membership	expect to roll into RFP for website	
Roll out online revenue survey	4FY11	Participation in revenue survey	in progress	tbd		
Push items out to members regularly	4FY11	Number of times items are pushed to members by IGFOA	in progress	Membership		
Active call for fresh documents/materials	2FY12	More and newer online documents	not started	Membership		
Identify and develop a core group of authors for content development and to respond to comments	4FY11	More new postings, more immediate responses, more page views of online forums	not started	Membership		
Develop Member on-line forum "How to" instructions	2FY12	More new postings, more immediate responses, more page views of online forums	not started	Membership		
Develop a succession plan for IGFOA's Legislative Committee chair						
Create links to other organizations legislative website pages	3FY11	New committee members	complete	Legislative	Legislative links updated; still room for expansion	Dave Richardson
Create list of potential committee chairs	4FY11	New leader(s) in place	in progress	Executive Board		
Create job description for legislative committee chair	3FY11	New leader(s) in place	complete	Executive Board		Dave Richardson
Post openings on IGFOA Jobline	4FY11	New committee members	not started	Legislative		
Send job description to short list and gauge interest	4FY11	New leader(s) in place	complete	Executive Board		

IGFOA Strategic Plan 2011-2012 Initiatives

Strategic Goal/Rock	Quarter Start*	Measure Success by	Status	Committee(s)	Notes	Volunteer Kudos
Begin to plan a mentor program to help orient new members and future leaders						
Create list of interested future leaders	3FY12	Sufficient nominees to fill positions annually	in progress	Nominating Committee		
Create opportunities for different membership segments to get together	2FY12	No volunteer positions empty	not started	All Boards and Committees		
Develop a profile for IGFOA leaders	3FY12	No volunteer positions empty	not started	Executive Board		
Develop and publish an Annual Training Plan and deliver training to members						
Encourage members to submit proposals for training sessions	3FY11	Offer 100 hours of training programs per year	in progress	Career Development/Conference		Brian Caputo, Kim Auchstetter
Identify hot topics throughout the year	3FY11	Continue to update training plan	in progress	Career Development	Change in actuarial cost method webinar; working smarter workshop; SB 1831	Entire Career Development and Conference Program Committees
Survey members and special districts regarding training wants and needs	4FY11	Increase attendance at training programs	not started	Career Development	IPP Institute attendance up	
Survey members and special districts regarding where they get training and for what	4FY11	Increase attendance at training programs	not started	Career Development		
Annually review and update core courses being offered	2FY12	Continue to update training plan	in progress	Career Development	Advanced Govt Acctng updated March11;	
Coordinate with related organizations so training programs offered are not duplicated	2FY12	Seminars not cancelled due to lack of attendance	in progress	Career Development		
Publish annual training plan for the following year	2FY12	Increase attendance at training programs	not started	Career Development		
Identify instructors for training programs	2FY12	Offer 100 hours of training programs per year	in progress	Career Development		