Illinois Government Finance Officers Association

Learning • Connecting • Progressing

Strategic Plan
July 1, 2024 – June 30, 2028
Approved: May 10, 2024
Modified: November 1, 2024, February 6, 2026, and April 16, 2026

IGFOA MISSION: To Promote Excellence in Government Finance

IGFOA VISION:

- **Deliver high quality, relevant, accessible training and resources.**
- **Provide expert government finance perspective on appropriate emerging issues.**
- **Foster growth in the government finance profession.**
- **Inspire IGFOA members to be good stewards of local communities and the government finance profession.**

The IGFOA Executive Board has established three strategic plan priorities for the period of July 1, 2024 to June 30, 2026:

1. **Enter into a new association management agreement and transition to a new Executive Director.**
2. **Increase engagement at IGFOA events by non-finance directors and those new to government.**
3. **Develop a proactive succession, transition and workforce continuity program.**

Action plans for each strategic plan priority can be found on the following pages.

1. **Enter into a new association management agreement and transition to a new Executive Director by December 31, 2024.**

   The current association management agreement with CM Services runs through December 31, 2024, and the current Executive Director is planning to depart by that date. To ensure that IGFOA continues to receive high quality services that are cost effective, an RFP process will be conducted with CM Services encouraged to participate in the process.

Assigned to:	**Executive Board and Negotiations Team**	
Action Plan:	**Due Date**	**Status**
Issue association management Request for Proposals (RFP)	June 2024	Completed – RFP issued June 21, 2024
Proposals Due	July 2024	Completed - Proposals received July 26, 2024
Evaluation of proposals and initial interviews	July 2024	Completed - Interviews completed
RFP Process Update	August 2024	Completed - August 9, 2024 Executive Board Meeting Discussion
Finalist interviews	August 2024	Completed - Executive Board finalist interviews completed.
Association management services contract award	September 2024	Completed - Executive Board approved agreement at a special September 27, 2024 meeting.
Association management services overlap and transition (if needed)	October to December 2024	Completed - Effective date of new agreement and transition with overlap of CM Services, October 1, 2024 – December 31, 2024.

2. Increase engagement through tracking attendance at IGFOA events by non-finance directors and those new to government, with a goal to increase attendance by 10% by June 30, 2026. Increased IGFOA membership and member engagement is critical to ensuring IGFOA's continued success. Support for government finance professionals at all levels of the organization with an emphasis on those new to government is a high priority.		
Assigned to:	**Membership Committee, assisted by PEC and Chapters**	
Action Plan:	**Due Date**	**Status**
Gather and analyze baseline attendance data for prior year.	June 2028	Ongoing - Develop system to gather and analyze attendance data going forward.
Determine best way to provide personalized follow-up for new members.	December 2024	Completed - Membership Committee started this process in January 2024.
Create networking opportunities for new Finance Directors, non-Finance Directors and new to government employees to meet others.	December 2024	Completed - Coordination through GEN, PEC, Chapters
Consider incentives and analyze financial impact of offering a referral discount for new IGFOA members	March 2025	Completed – we did this for new members 2025 remaining months free with 2026 paid dues.
Create a campaign for members and partners to bring a non-Finance Director/New to Government employee to an event	June 2025	Completed – we do campaigns with Brian and membership committee.
Add optional demographic tracking to member profile information on web site	June 2028	Ongoing – Working on to see if web site can do or not

3. Develop a proactive succession, transition and workforce continuity program through education and increased resources by June 30, 2026. It is critical that government finance operations continue regardless of extended absences, employee vacancies and retirements. IGFOA members are also facing a challenging employee recruitment and retention environment.		
Assigned to:	**Professional Education Committee (PEC), assisted by Growth and Engagement (GEN) and Chapters**	
Action Plan:	**Due Date**	**Status**
Create branding for this program to be introduced at Annual Conference	September 2024	Completed - 2024 annual conference theme and logo used to launch? We do an annual logo and have talked about these topics soft skills, teamwork, conflict, workforce etc.
Plan annual conference sessions and other training through coordination with PEC and Conference Planning Team	November 2024	Completed - Topics such as benefits of succession planning, overcoming challenges for future leaders, time management.
Create a formal network of resources ("Help Line") by topic area and job type.	June 2025	Proposed Change – Not doing
Offer networking opportunities for all levels of finance staff to engage with each other.	June 2025	Completed – RLSF fundraiser at conference and new membership appreciation networking vs speaker, several other PEC and GEN events (example training and schools). I believe this is being achieved.

Ongoing
Completed
Proposed Change
Work in Progress

Discussed with Executive Board April 16, 2026 - President Beckmann