



# *Strategic Plan 2011*

Virginia Government Finance Officers' Association



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## **Introduction**

Strategic planning is a practice that all professionally managed organizations undertake periodically to enable the organization to focus on its mission and members. While the VGFOA has been in existence since 1968, it wasn't until calendar year 2000 that strategic planning became formally incorporated into the organization. In continuing with this best management practice, it is anticipated that the VGFOA board will periodically review the strategic plan to evaluate progress in obtaining existing goals and to chart a course for the future of the organization. Strategic planning involves a fresh and visionary perspective of the organization's mission, core focus areas, initiatives, resource structure and allocation. It also enables those participating in the process to represent their membership and, through collaboration, make the organization stronger, more responsive and more engaged. The results from such successful strategic planning are to capitalize on successful current practices and formulate focus areas that recognize and anticipate the changing marketplace and environment in order to best prepare our members. By maintaining the history of the VGFOA strategic planning process, we are capitalizing on past success while planning for the future.

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## **Mission**

*The Virginia Government Finance Officers' Association shall be the premier organization in developing governmental and financial leaders in the Commonwealth.*

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## **2011 STRATEGIC PLAN**

The following strategic plan was developed in 2011 to address the evolving needs and challenges facing the VGFOA. The organization of this plan is based on the identified focus areas of the Outreach, Professional Development, Membership, Education, Legislative Activities, and Leadership. The Executive Board identified a number of goals that align with one or more of these focus areas. This strategic plan will provide the basis for organizational and committee actions from year-to-year and should be revised annually based upon progress and the changing environmental challenges confronting the VGFOA.

## **Focus Areas**

The VGFOA Executive Board identified these focus areas to accomplish the mission of the organization:

Outreach	Professional Development
Membership	Education
Legislative	Leadership

In 2010 the Executive Board underwent a major project to update the Strategic Plan which significantly redefined the focus areas from the 2008 Strategic Plan. During the 2011 update the Executive Board determined that the focus areas continued to be relevant so no changes were made to the focus areas or goals.

## **Goals**

The 2011 Strategic Plan reflects the same goals as that the Executive Board identified during the thorough goal-setting process undertaken one year ago. These goals are:

Continue to strengthen our educational offerings

Increase our legislative profile

Continue to strengthen regional organizations

Advocate further the government finance professional

Promote more brand recognition for VGFOA

Expand social media

Maintain VGFOA long-term sustainability

Continue collaborative efforts with other professional organizations

## **Strategic Planning Matrix**

The following Strategic Planning Matrix was prepared by the Executive Board to:

- develop action steps necessary to support each of our goals
- determine a time frame for each action step
- assign a committee or committees, Board member or contractor(s) responsible for each action step
- identify the focus area(s) represented by the action step

The matrix was updated in 2011 to reflect progress on these steps, modify steps and delete those no longer considered necessary.

VGFOA Strategic Planning Matrix - 2011				Focus Areas					
Goals	Action Steps	Year	Committee(s)	Outreach	Professional Development	Membership	Education	Legislative	Leadership
<b>1</b>	<b>Continue to strengthen our educational offerings</b>								
	Utilize an annual report process to track attendance at various educational courses	2012	Education				x		
	Strive to add one to two courses per year	Ongoing	Education				x		
	Evaluate whether any VGFOA courses should be discontinued, modified or undergo change in course content	Ongoing	Education				x		
	Strive to add one to two web-enabled courses per year	Ongoing	Education				x		
	Develop a class or classes geared toward development of core accounting skills	2013	Education	x	x		x		
	Evaluate whether to add "tracts" at spring or fall conferences (budget, schools, authorities)	2012	Conferences				x		
	If Board desires to implement a tract system, determine a conference at which this can be piloted and assessed for further expansion	2012	Conferences				x	x	
	Evaluate whether to move to one conference per year	Later	Conferences				x		
	Develop a method of incorporating roundtable and/or panel discussions into our conferences	2012	Conferences		x		x		
	Re-write budget course	2013	Education						
	Re-write human resources course	2013	Education						
	Expand pool of available instructors	Ongoing	Education Education/Regional Organization	x	x	x	x		x
	Provide CPE credit for regional organization courses	Ongoing		x			x		
<b>2</b>	<b>Increase our legislative profile</b>								
	Meet with VML and VACO to discuss this potential and to determine what an appropriate VGFOA focus might be	2012	Officers					x	
	Consider conflict of interest concerns that may arise from taking a stand on legislative matters	2012	Board					x	
	Participate in government reform discussions	2012	Board					x	x
	Develop several initiatives the Board will pursue in upcoming general assembly	2012	Board					x	x
	Work with GFOA to understand their methodology of legislative leadership at the federal level	2012	Officers					x	x
	Evaluate merit of forming a separate Legislative committee. If so, determine appropriate leadership and membership	2012	Board					x	
<b>3</b>	<b>Continue to strengthen regional organizations</b>								
	Ensure each regional organization remains active with several events per year	Ongoing	Regional Orgs	x	x	x	x		
	Ensure each regional organization has a committee that has representation from multiple communities throughout the region	Ongoing	Regional Orgs	x	x				x
	Monitor regional organization interest and participation to consider need for new regions	Ongoing	Regional Orgs	x	x	x	x		
	Evaluate whether current administrative structure for regional organizations is meeting needs	Ongoing	Regional Orgs				x		x
	Evaluate the need for policy revisions based on evolution of regional organizations	Ongoing	Regional Orgs/Board Communications and Technology/Regional Orgs						x
	Evaluate self-service web sites for regional organizations	2012		x	x				
	Evaluate annually the support requirements from Administrator versus the level of work done by the committees; make changes as needed	Ongoing	Regional Orgs	x					

VGFOA Strategic Planning Matrix - 2011				Focus Areas					
Goals	Action Steps	Year	Committee(s)	Outreach	Professional Development	Membership	Education	Legislative	Leadership
<b>4</b>	<b>Advocate further the government finance professional</b>								
	a Participate in CAFR certificate and budget award presentations when invited	Ongoing	Past President	x	x				x
	b Continue scholarship offerings; evaluate changes that might be appropriate	Ongoing	Awards and memberships	x	x		x		x
	c Continue newsletter articles that focus on individuals	Ongoing	Communications and technology		x				
	d Evaluate methods to advocate government finance professional at college and university level	2012	Awards and memberships	x		x			x
	e Develop a method whereby Past Presidents may assist with furtherance of the government finance professional	2012	Past President	x	x				x
	f Continue inviting our student scholarship recipients to attend our conferences - consider fall as well as spring conferences	Ongoing	Awards and memberships	x		x			x
	g Implement permanent program of flagging first time conference attendees so Board members can invite their further participation	2012	Conferences	x	x	x			x
<b>5</b>	<b>Promote more brand recognition for VGFOA</b>								
	a Develop a formal outreach program for communities with no current VGFOA involvement - consider offering one free conference or course attendance for one member of each locality not currently involved in VGFOA	2012	Awards and Memberships	x	x	x	x		x
	b Decide whether the VGFOA should formally adopt values which could be advertised/marketed	2012	Board	x	x				x
	c Continue preparing VGFOA responses to GASB exposure drafts	Ongoing	Standard Setting						
	d Continue the practice of announcing board members at the start of our annual conferences	Ongoing	President						x
	e Promote Virginia representation on GFOA committees and Executive Board as well as attendance at annual conference	Ongoing	Board						x
<b>6</b>	<b>Expand social media</b>								
	a Undertake daily or weekly posting of topics and events on Facebook to encourage participation	2012	Communications and technology	x		x			
	b Continue to evaluate and expand social and professional media while ensuring we will maintain what we establish	2012	Communications and technology	x	x				
	c Bring recommendations to Board concerning next steps with social media	2012	Communications and technology	x		x			x
	d Consider creating a presence on LinkedIn	2012	Communications and technology	x	x				
<b>7</b>	<b>Maintain VGFOA long-term sustainability</b>								
	a Develop a policy pertaining to maintenance of, use of and replenishment of VGFOA fund balance	2012	Treasurer/Board						x
	b Continue current practice of very carefully undertaking annual budget process with long term planning in mind	Ongoing	Board						x
	c Evaluate current committee composition and recommend changes that may be appropriate	2012	Board						x
	d Continue to consider pricing practices that encourage membership and allow VGFOA to plan ahead (ie: 2011 membership fee waiver with early conference registration)	Ongoing	Awards and memberships/Board	x		x			x
	e Continue expanding pool of vendors available for sponsorship and exhibition at conferences	Ongoing	Associate member	x					x
	f Solicit input from associate members to ensure our policies and practices are working well for them so as to ensure continued strong relationships	2012	Associate member	x		x			x
	g Periodically evaluate membership fees with goals of upholding value to membership and avoiding large single year increases	Ongoing	Awards and memberships/Board			x			
	h Consider implementation of a "buddy system" to match first time attendees with Board members	2012	Awards and Memberships	x		x			x

VGFOA Strategic Planning Matrix - 2011				Focus Areas					
Goals	Action Steps	Year	Committee(s)	Outreach	Professional Development	Membership	Education	Legislative	Leadership
<b>8</b>	<b>Continue collaborative efforts with other professional organizations</b>								
a	Participate with VML and VACO when possible	Ongoing	Officers	x	x			x	x
b	Continue relationship with GFOA through inviting GFOA Board members to speak at our conferences	Ongoing	Officers	x	x		x		x
c	Consider whether VGFOA and VASBO can work together on conference offerings and/or training	2012	VGFOA Board members who serve School Divisions	x	x		x		x
d	Evaluate appropriate contract to undertake with Treasurer's Association of Virginia relative to educational courses	2012	Education	x			x		x
e	Collaborate and communicate with other professional organizations to include: VSCPA, TAV, VML, VACO, VFC, VASBO, VLGMA, VLGA, Internal Audit group,	Ongoing	Board	x	x			x	x
f	Consider method of storing list serve discussion topics for future reference	2012	Communications and Technology	x			x	x	x

# 2011 Update to 2010 Strategic Plan

## 2010 STRATEGIC PLAN

### Progress Report

Strategic planning is not a static process, and therefore, an important component of the strategic planning continuum involves an examination of the organization's progress in implementing existing goals and objectives and fulfilling the mission statement. In 2010, the Board of Directors updated the mission and identified the six focus areas for VGFOA with eight goals which aligned to one or more of the focus areas. This was published as the 2010 Strategic Plan. In 2011, the Board reviewed these goals and stated progress toward accomplishing each goal.

### Focus Areas

The 2010 focus areas were:

- Outreach
  - Membership
  - Legislative
  - Professional Development
  - Education
  - Leadership
- 

#### **Goal 1:** Continue to strengthen our education offerings

- a. Utilize an annual report process to track attendance at various educational courses
  - b. Strive to add one to two courses per year
  - c. Evaluate whether any VGFOA courses should be discontinued, modified or undergo change in course content
  - d. Strive to add one to two web-enabled courses per year
  - e. Develop a class or classes geared toward development of core accounting skills
  - f. Evaluate whether to add "tracts" at spring or fall conferences (budget, schools, authorities)
  - g. If Board desires to implement a tract system, determine a conference at which this can be piloted and assessed for further expansion
  - h. Evaluate whether to move to one conference per year
  - i. Develop a method of incorporating roundtable and/or panel discussions into our conferences
  - j. Re-write budget course
  - k. Re-write human resources course
  - l. Expand pool of available instructors
  - m. Provide CPE credit for regional organization courses
-

Progress report: The VGFOA Education/Certificate Committee was very active this past year working with Radford University Governmental and Nonprofit Assistance Center (GNAC) to coordinate three new on-line course offerings: Internal Controls, Auditing and Fraud, Introduction to Governmental Accounting and Intermediate Accounting as well as, expanding the pools of available instructors and conducting conference calls with the instructors to increase participation in course development and provide interaction among the instructors. The Regional Committee has worked to ensure that CPE credit is issued for each event in accordance with the BOA guidelines.

**Goal 2:** Increase our legislative profile

- a. Meet with VML and VACO to discuss this potential and to determine what an appropriate VGFOA focus might be
- b. Consider conflict of interest concerns that may arise from taking a stand on legislative matters
- c. Participate in government reform discussions
- d. Develop several initiatives the Board will pursue in upcoming general assembly
- e. Work with GFOA to understand their methodology of legislative leadership at the federal level
- f. Evaluate merit of forming a separate Legislative committee. If so, determine appropriate leadership and membership

Progress report: The VGFOA Board actively discussed options for increasing the VGFOA's profile on legislative issues. The Board voted to separate the Legislative Committee from the Standard Setting and Legislative Committee to provide a focus on addressing legislative involvement. The makeup of the Legislative Committee was discussed which provided emphasis seeking out involvement from past presidents. The Legislative Committee chair will be determined by the VGFOA Presidents each year.

**Goal 3:** Continue to strengthen regional organizations

- a. Ensure each regional organization remains active with several events per year
- b. Ensure each regional organization has a committee that has representation from multiple communities throughout the region
- c. Monitor regional organization interest and participation to consider need for new regions
- d. Evaluate whether current administrative structure for regional organizations is meeting needs
- e. Evaluate the need for policy revisions based on evolution of regional organizations
- f. Evaluate self-service web sites for regional organizations
- g. Evaluate annually the support requirements from GNAC versus the level of work done by the committees; make changes as needed

Progress report: All regions are active providing training events on a monthly, bi-monthly and/or quarterly basis contributing to the growing participation and involvement from members and non-members. Each region has a diverse committee in place for planning purposes developing programs around the specific needs of the regional members. The four regions are meeting the current needs of members with no additional interest in creating a new region. VML/VACo is providing outstanding support to the regional organizations including providing advertising and registration for the Regional Organizations via the VGFOA website. Current policies have been reviewed and will continue to be evaluated based on changing dynamics of the regional organizations.

**Goal 4:** Advocate further the government finance professional

- a. Participate in CAFR certificate and budget award presentations when invited
- b. Continue scholarship offerings; evaluate changes that might be appropriate
- c. Continue newsletter articles that focus on individuals
- d. Evaluate methods to advocate government finance professional at college and university level
- e. Develop a method whereby Past Presidents may assist with furtherance of the government finance professional
- f. Continue inviting our student scholarship recipients to attend our conferences - consider fall as well as spring conferences
- g. Implement permanent program of flagging first time conference attendees so Board members can invite their further participation

Progress report: As requests have been received to present CAFR certificates and budget awards VGFOA Board members have volunteered to make presentations to the governing boards of the award recipients. Participation in the scholarship programs has been very high resulting in full utilization of the scholarships. The Pettigrew Scholarship provides a link between VGFOA and the college and university professors increasing VGFOA's exposure to accounting students who may become interested in local government finance positions in the future.

**Goal 5:** Promote more brand recognition for VGFOA

- a. Develop a formal outreach program for communities with no current VGFOA involvement - consider offering one free conference or course attendance for one member of each locality not currently involved in VGFOA
- b. Decide whether the VGFOA should formally adopt values which could be advertised/marketed
- c. Continue preparing VGFOA responses to GASB exposure drafts
- d. Continue the practice of announcing board members at the start of our annual conferences
- e. Secure different color (than black) for Past President ribbons
- f. Promote Virginia representation on GFOA committees and Executive Board as well as attendance at annual conference

Progress report: The VGFOA is continually branded. Our web site and newsletters assist with this along with VGFOA members' active participation and leadership throughout

the state and nationally with Virginia representatives on GFOA's committees and sharing knowledge presenting at the GFOA conferences. The expansion of the Regional Organizations has enabled us to reach additional new members, expanding the VGFOA brand.

**Goal 6:** Expand social media

- a. Undertake daily or weekly posting of topics and events on Facebook to encourage participation
- b. Continue to evaluate and expand social and professional media while ensuring we will maintain what we establish
- c. Bring recommendations to Board concerning next steps with social media
- d. Consider creating a presence on LinkedIn

Progress report: VGFOA members and non-members continuously share knowledge through the VGFOA List Serve.

**Goal 7:** Maintain VGFOA long-term sustainability

- a. Develop a policy pertaining to maintenance of, use of and replenishment of VGFOA fund balance
- b. Continue current practice of very carefully undertaking annual budget process with long term planning in mind
- c. Evaluate current committee composition and recommend changes that may be appropriate
- d. Continue to consider pricing practices that encourage membership and allow VGFOA to plan ahead (ie: 2011 membership fee waiver with early conference registration)
- e. Continue expanding pool of vendors available for sponsorship and exhibition at conferences
- f. Solicit input from associate members to ensure our policies and practices are working well for them so as to ensure continued strong relationships
- g. Develop a succession plan relative to our contract with GNAC
- h. Periodically evaluate membership fees with goals of upholding value to membership and avoiding large single year increases
- i. Consider implementation of a "buddy system" to match first time attendees with Board members

Progress report: At the request of GNAC staff who wished to focus exclusively on providing education services, VGFOA underwent a competitive process to select a new administrator awarding the contract to VML/VACo Finance. The Award Committee performed a comprehensive review of our pricing practices providing recommendations approved by the board to address processes and pricing for conference and membership fees which included the implementation of a late fee for membership dues. With the guidance provided by our treasurer during challenging economic times, the VGFOA Board reviewed the budget assumptions carefully to establish the current year's budget with long term planning in mind.

**Goal 8:** Continue collaborative efforts with other professional organizations

- a. Participate with VML and VACO when possible
- b. Continue relationship with GFOA through inviting GFOA Board members to speak at our conferences
- c. Consider whether VGFOA and VASBO can work together on conference offerings and/or training
- d. Evaluate appropriate contract to undertake with Treasurer's Association of Virginia relative to educational courses
- e. Collaborate and communicate with other professional organizations to include: VSCPA, TAV, VML, VACO, VFC, VASBO, VLGMA, VLGAA, Internal Audit group
- f. Consider method of storing list serve discussion topics for future reference

Progress report: VGFOA Board members have continued to strengthen the relationship with GFOA, inviting GFOA staff to speak at our conferences, encouraging VGFOA members to be involved with GFOA as committee members, CAFR and Budget reviewers, presenters, and annual conference enrollment.

## **2008 STRATEGIC PLAN**

### **Progress Report**

Strategic planning is not a static process, and therefore, an important component of the strategic planning continuum involves an examination of the organization's progress in implementing existing goals and objectives and fulfilling the mission statement. In 2007, the Board of Directors updated the mission and identified the three focus areas of VGFOA organization, professional development, and membership under which eight goals were associated. This was published as the 2008-2012 Strategic Plan. In 2010, the Board reviewed these goals and stated progress toward accomplishing each goal.

### **Focus Areas**

The 2008 focus areas were:

- VGFOA Organization
- Professional Development
- Membership

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### **Focus Area**

## VGFOA Organization

**Goal:** “*Brand*” the VGFOA throughout Virginia as the organization for public sector financial professionals.

1. Revise the mission statement.
2. Identify and communicate successes of VGFOA.
3. Develop a marketing strategy.
4. Investigate the benefits of establishing a VGFOA position on legislative matters.
5. Create opportunities for two-way communication between VGFOA and Virginia finance professionals.

Progress report: The VGFOA is continually branded. Our web site and newsletters assist with this along with VGFOA members’ active participation and leadership throughout the state. The creation of a Facebook presence and the availability of our List Serve for anyone wishing to use it helps brand our organization. Our Regional Organizations enable us to reach additional members, expanding the VGFOA brand.

**Goal:** “*Prepare for the future.*” Position the VGFOA for continued stable growth regardless of economic & demographic challenges

1. Ensure the financial viability to meet future needs.
2. Study changes in financial field to create approaches to attract new people to the field of government finance.
3. Survey best practices of other organizations.
4. Develop partnerships/collaborations to strengthen VGFOA.
5. Enable access to cutting edge products, services, technologies through healthy (and expanding) vendor relationships.

Progress report: The VGFOA Executive Board has focused carefully on management of the organization with long term sustainability in mind. Our financial practices continue to improve and we continue to focus upon them more. As our fund balance has become a bit large, we have implemented steps to methodically utilize some of this balance to give back to our members. Additionally, due to the current difficult financial times, this fund balance has been very beneficial in protecting the organization from these economic challenges. The VGFOA maintains positive working relationships with other organizations throughout the Commonwealth, such as TAV, VML, VACO, etc. The VGFOA maintains active participation in GFOA as a means of remaining current on matters of importance to the organization and profession.

## Focus Area Professional Development

**Goal:** Prepare VGFOA members for career advancement through a variety of approaches including educational opportunities, networking, etc.

1. Study the prospects of developing regional social opportunities.
2. Examine the current conference structure to identify if it meets the professional needs of current and potential attendees.
3. Continue the high quality of the Certification program.

Progress report: The establishment of Regional Organizations has been a major milestone toward accomplishment of this goal. Spring and fall conferences have continually changed to meet members' needs including an increase in the available CPE at each. The certificate program continues. A number of VGFOA members serve on the committees of GFOA and we've had several GFOA Board members over the years as well.

### *Education*

**Goal:** Expand educational offerings to meet identified needs of all target populations.

1. Conduct a needs analysis of Virginia government finance professionals.
2. Examine the opportunity for incorporating technology through distance learning.

**Action Plan Items:**

- 1) Create relevant new course offerings to meet needs for all VGFOA members.
- 2) Examine additional tracks at conferences.
- 3) Target mid-level financial professionals.

Progress report: The regional organizations have served to provide additional educational offerings to our members. We have also developed a few courses in each of the last years. Work with our educational offerings will be ongoing.

**Goal:** Ensure that educational outcomes provide value to our members and partnering organizations.

1. Evaluate current programs and offerings.
2. Expand scholarship programs.

Progress report: See other progress reports. Scholarship programs have been fully utilized each year including times when the VGFOA has been creative due to a lack of applicants, cancelled GFOA programs, etc. Our Pettigrew Scholarship again better utilizes our college and university professors and has increased our interface with them.

### *Fellowship*

**Goal:** Build and enhance relationships among Virginia finance professionals throughout the Commonwealth.

1. Continue high standards of engaging receptions at semi-annual conferences.
2. Build a system of engaging new members at conferences.
3. Increase use of website and other technologies for networking opportunities.
4. Explore regional approach to expand VGFOA.
5. Actively engage past leaders/members in current activities.

Progress report: There is ongoing progress in the area of relationship-building. VGFOA continues to strengthen relationships with other organizations such as the TAV, VML, VACO, etc. VGFOA conferences continue to offer great networking and fellowship opportunities and the regional organizations serve an even larger group of people to foster sharing of ideas and experiences. The Past Presidents continue their active support of VGFOA activities.

## **Focus Area**

### **Membership**

**Goal:** Increase VGFOA membership numbers by attracting diverse populations (including budget staff, smaller government or entry level staff, etc.)

1. Identify needs of all potential VGFOA members.

**Action Plan Items:**

- 1) Survey to all VA localities
    - Include other populations, such as budgeting
    - Consider college populations for membership
  - 2) Personal contact
  - 3) Target populations
2. Prioritize needs of the populations.
  3. Based on findings, engage in more active outreach efforts

Progress report: A membership brochure has been developed and printed for use in inviting interested parties to consider membership in the organization. The VGFOA has not pursued some of the other activities though we have attempted to flag first time conference attendees such that Board members could help make them feel welcome at our conferences. Due to some size limitations in our conference facilities, we realize that there may be benefits to remaining close to our current size. Membership has increased as a result of our regional organizations, and we are considering future outreach to communities without any VGFOA involvement. The Board is not overly concerned about increasing the size of VGFOA membership. Quality of membership participation is more important to us at this time than quantity of members.

**Goal:** Increase active participation of existing members.

1. Create a development plan for growth and involvement for VGFOA members.

**Action Plan Items:**

- 1) Identify the groups of people who are not coming
- 2) Investigate/study regional outreach possibilities

- 3) Market the values of the VGFOA
- 4) Identify potential new markets
- 5) Create membership committee to address this new need/interest
  - Strategic membership plan
- 6) Create programming for continued involvement of members throughout career (including Past Presidents, etc.)

Progress report: A structured plan has not been developed for increasing the active participation of our members. Existing members have naturally become more involved to the extent they participate in Regional Offerings. Committee participation has increased in recent years. Our Past Presidents are fairly active and have provided strong support to the organization.

## **2004 STRATEGIC PLAN**

### **Progress Report**

Strategic planning is not a static process, and therefore, an important component of the strategic planning continuum involves an examination of the organization's progress in implementing existing goals and objectives and fulfilling the mission statement. In 2004, the Board of Directors determined the mission and the focus areas of education, membership/fellowship, and professional development could best be accomplished through a committee structure that assigns oversight responsibility to the appropriate Board Member. This group developed the following strategic goals for the entire VGFOA Board with such goals categorized under the primary oversight committee, where applicable, with other committees and membership support provided as needed. In 2007, the Board re-visited these goals and stated progress toward accomplishing each goal.

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### **Focus Area**

#### **Education**

##### *President*

**Goal:** Through liaisons with affiliated organizations, promote VGFOA educational opportunities, especially the Certification Program.

**Progress Report:** Promoted Certification Program, Partner with Treasurer's Association

##### *Education Committee*

**Goal:** Develop a plan to address long-term conference-site objectives regarding site locations and contractual arrangements. Establish standards as they pertain to completion of the various tasks associated with a conference to ensure that VGFOA will always provide for high quality educational opportunities.

**Progress Report:** The Spring Conference location for 2007 and 2008 has been decided. The Fall Conference location for 2007, 2008, 2009 and 2010 has been decided.

**Goal:** Develop quantifiable objectives for membership attendance and customer satisfaction for both calendar year and long-term goals.

**Progress Report:** Deleting this goal

**Goal:** Establish guidelines for Continuing Professional Education (CPE) eligibility.

**Progress Report:** In accordance with the Virginia Board of Accountancy, CPE Credit documentation shall be in the form of the certificate of completion provided by the sponsor. The VGFOA provides this documentation to all attendees for its conferences and certification classes.

**Goal:** Develop a checklist for reviewing and revising courses and course material in response to the changing role of the finance professional.

**Progress Report:** Ongoing progress

**Goal:** Recruit skilled instructors in geographic regions with relevant expertise to the course material. Establish a recognition program that provides incentives for instructors to continue participation in VGFOA educational programs.

**Progress Report:** Qualified instructors are obtained for each class.

**Goal:** Develop plans to promote the Certification Program to our members. Encourage governmental leaders to recognize the value of the certification as an achievement in professional development and to establish the Certificate as a preferred recruitment criterion.

**Progress Report:** The VGFOA promotes the Certification Program through the monthly newsletter via email and our annual spring and fall conferences.

### *Government Finance Research Committee*

**Goal:** Determine resources and other relevant information, including training opportunities, which can best update members on relevant legislation and standards. Such as providing flash emails during the General Assembly.

**Progress Report:** Ongoing

**Goal:** Define guidelines for VGFOA to take an advocacy position with respect to existing or proposed local, State or Federal laws and regulations.

**Progress Report:** Ongoing

### *Technology Committee*

**Goal:** Determine the feasibility and practicality of providing web based education and CPE opportunities.

**Progress Report:** Working on GASB 45 web based training.

**Goal:** Provide web-based registration and payment.

**Progress Report:** Done

## **Focus Area**

### **Membership & Fellowship**

#### *President*

**Goal:** Determine feasibility of providing, or partnering with another organization, for organized fellowship gathering at national GFOA Conference.

**Progress Report:** VGFOA currently sponsors breakfasts and past presidents dinner suite at the National GFOA conference

#### *Vice President (converted to President elect)*

**Goal:** Develop an orientation session at the Annual VGFOA Conferences for new and existing members to cover our history, organization goals, Committees, and Board structure. Allot time fellowship and networking.

**Progress Report:** An orientation session will be held at the upcoming Spring Conference.

#### *Membership and Awards Committee*

**Goal:** Conduct periodic satisfaction surveys of the membership using the web site and emails.

**Progress Report:** Surveys administered at the fall and spring conferences

**Goal:** Enhance awards and scholarships through targeted budget allocations.

**Progress Report:** Efforts to advertise scholarships include calls and letters to universities, posting on the VGFOA website and in newsletters. Innovations Award Program has been reinstated.

**Goal:** Establish a “Members Only Section” on the web site.

**Progress Report:** Ongoing

**Goal:** Develop membership profiles to track employer, position, interests, years served, classes attended and certifications.

**Progress Report:** Ongoing

**Goal:** Develop a formalized process for all existing and potential award programs to ensure that the memberships, including associate members, are properly solicited.

**Progress Report:** Ongoing

**Goal:** Establish a vendor recognition program for those associate members and/or their firms who have contributed to the organization in time and/or funding.

**Progress Report:** Associate Membership Relations committee set up for this effort.

**Goal:** Periodically sponsor gatherings around the state in an effort to attract new members and provide fellowship for existing members.

**Progress Report:** Northern Virginia local finance professionals have held meetings. Richmond area finance professionals have met.

### *Education Committee*

**Goal:** Provide for evening fellowship opportunities at educational events.

**Progress Report:** Receptions are held at our annual conferences.

### *Newsletter Committee*

**Goal:** Develop a monthly electronic newsletter and establish a process to encourage member and vendor contributions.

**Progress Report:** At last Board meeting (December 2006), it was decided to go to a twice a year newsletter that would follow the Fall and Spring Conferences, rather than monthly. This started in 2007 when previously the newsletter had been monthly. And, both members and vendors have made contributions to newsletters by submitting various articles and informational items of interest.

**Goal:** Encourage member and vendor advertising.

**Progress Report:** Ongoing

## *Technology Committee*

**Goal:** Enhancement of the web site to provide for pictures and other visuals including information about current Board members, lifetime members, past-presidents and award winners.

**Progress Report:** Done

## **Focus Area**

### **Professional Development**

#### *President*

**Goal:** Formulate an overall committee-based strategy for contracted services that operate in perpetuity (e.g., WEB site, administrative services).

**Progress Report:** Relationships with GNAC, legal counsel, and audit firm

#### *Vice President (converted to President-Elect)*

**Goal:** Perform research of best practices and successes of other state GFOA associations and membership-based organizations.

**Progress Report:** Research performed for developing vendor relations

#### *Treasurer*

**Goal:** Establish the position of Treasurer on the Executive Board with oversight responsibility for financial reporting, budgeting, risk management and mitigation, the annual audit, and reporting to the Internal Revenue Service.

**Progress Report:** Done

**Goal:** Develop a business model by which the VGFOA can best leverage resources in the most appropriate manner through a combination of dues, conference/educational training fees and associate member support and determination.

**Progress Report:** Dues – added population based option. Improved membership billing. Bought QuickBooks. Now have web-based registrations and payment.

#### *Past President*

**Goal:** Increase the profile of VGFOA within the Commonwealth and nationally by encouraging members to note their VGFOA affiliation when speaking or writing articles.

**Progress Report:** On going

**Goal:** Formulate a Code of Ethics for the organization.

**Progress Report:** Reviewed and adopted GFOA Code of Ethics

**Goal:** Develop an organizational chart that addresses and delineates lines of responsibility and oversight over all Board members and any contracted assistance.

**Progress Report:** By-laws defined responsibilities; By-laws have been added to website.

### *Membership and Awards Committee*

**Goal:** Enhance the appearance of all awards to best reflect the professional achievement of the award recipient.

**Progress Report:** Awards are now presented in front of full membership. Lifetime achievement plaque created. Created new plaque for Innovation award.

## VGFOA 2011 EXECUTIVE BOARD

President

*Vivian McGettigan*  
Chief Internal Auditor  
Prince William County Public Schools

President Elect

*Patricia Weiler*  
Finance Director  
City of Manassas

Treasurer

*Karen Woodson*  
Accountant III  
City of Chesapeake

Executive Secretary

*Steve Mulroy*  
Deputy Director  
VML/VACo Finance

Past President

*Ann Shawver*  
Director of Finance  
City of Roanoke

Legislative Committee

*Ann Shawver*  
Director of Finance  
City of Roanoke

Associate Membership Relations

*Terrie Pyeatt*  
Director of Internal Audit  
Virginia Beach City Public Schools

Awards and Membership Committee

*Barbara Dameron*  
Finance Director  
City of Danville

Regional Organizations Committee

*Charles Ramsay*  
Accounting Section Manager  
County of Henrico

Standards Setting Committee

*Kim Williams*  
Chief of Accounting and Reporting  
Town of Leesburg

Education/Certification Committee

*Greg Akers*  
Director of Finance  
Richmond Metropolitan Authority

Conferences Committee

*Renee Hoover*  
Director of Finance  
County of Fluvanna

## VGFOA 2010 EXECUTIVE BOARD

### President

*Ann Shawver*  
Director of Finance  
City of Roanoke

### President Elect

*Vivian McGettigan*  
Chief Internal Auditor  
Prince William County Public Schools

### Treasurer

*Patricia Weiler*  
Finance Director  
City of Manassas

### Executive Secretary

*Bruce W. Chase*  
Professor of Accounting  
Director, Governmental and Nonprofit  
Assistance Center  
Radford University

### Past President

*Marycarol White*  
Director of Financial & Mgmt. Ser.  
York County

### Education/Certification Committee

*Tanya Burrell*  
Financial Reporting Manager  
Fairfax County Dept. of Finance

### Conferences Committee

*Nickie Champion*  
County of Gloucester  
Director of Financial Services

### Legislative and Standards Committee

*Charles Ramsay*  
Accounting Section Manager  
County of Henrico

### Communications & Technology Committee

*Shakeel Yusuf*  
Comptroller  
Fairfax County Public Schools

### Awards and Membership Committee

*Barbara Dameron*  
Finance Director  
City of Danville

### Associate Membership Relations

*John Wallingford*  
Director of Financial Services  
Prince William County Public Schools

### Regional Organizations Committee

*Karen Woodson*  
Accountant III  
City of Chesapeake

## VGFOA 2007 EXECUTIVE BOARD

President

*Rebecca Owens*  
Director of Finance  
County of Roanoke

President Elect

*Steve Solomon*  
Director of Finance  
Fairfax County Housing

Treasurer

*Marycarol White*  
Director of Financial and  
Management Services  
York County

Executive Secretary

*Bruce W. Chase*  
Professor of Accounting  
Director, Governmental and Nonprofit  
Assistance Center  
Radford University

Past President

*Terry Stone*  
Director of Finance  
County of Hanover

GFOA State Representative & Historian

*William Skinker*  
CFO  
Fauquier County Water and  
Sanitation Authority

Education/Conferences Committee

*Ann Shawver*  
Deputy Director of Finance  
City of Roanoke

Education/Certification Committee

*Patricia Weiler*  
Director of Finance  
City of Manassas

Legislative and Standards  
Committee

*Vivian McGettigan*  
Finance Director  
Fauquier County and Public Schools

Communications & Technology  
Committee

*Leslie Beauregard*  
Director, Budget and Performance  
Management  
City of Charlottesville

Awards and Membership Committee

*JoEllen Kerns*  
Senior Budget Analyst  
County of Loudon

Associate Membership Relations

*Charles Ramsay*  
Senior Accountant  
County of Henrico

## VGFOA 2004 EXECUTIVE BOARD

### OFFICERS AND PAST

#### PRESIDENT:

##### President

*Larry D. Clark*  
Treasury Division Director  
County of Henrico

##### President Elect

*Phillip Grant*  
Director of Finance  
Town of Vienna

##### Vice President

*Terry S. Adams*  
Utility Controller  
County of Hanover

##### Executive Secretary-Treasurer

*Bruce W. Chase*  
Professor of Accounting  
Director, Governmental and Nonprofit  
Assistance Center  
Radford University

##### Past President

*Joseph P. Casey*  
Director of Finance  
County of Hanover

##### Awards and Membership Committee

*JoEllen Kerns*  
Senior Budget Analysis  
County of Loudon

#### COMMITTEES:

##### Education Committee Co-Chair

*Rebecca Owens*  
Director of Finance  
County of Roanoke

##### Education Committee Co-Chair

*Ronald L. DeWitt*  
Accounting Manager  
City of Newport News

##### Newsletter Committee

*Marycarol C. White*  
Director of Financial and  
Management Services  
County of York

##### Government Finance Research Committee

*Steven A. Solomon*  
Chief, Automated Financial Services  
County of Fairfax

##### Technology Committee

*Bruce M. Grant*  
Director of Finance and  
Administrative Services  
Western Virginia Water Authority

##### State Representative

*Shelley Carmichael*  
Comptroller  
County of Stafford