



Strategic Plan 2010

Virginia Government Finance Officers' Association



VGFOA

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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.

Mission

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

2010 STRATEGIC PLAN

The following strategic plan was developed in 2010 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
Membership
Legislative

Professional Development
Education
Leadership

These have been updated from the 2008 Strategic Plan and will be continually shaped and modified as appropriate to reflect the key areas of emphasis of VGFOA.

Goals

In its work to develop the 2010 Strategic Plan, the Executive Board undertook a lengthy goal-setting process. After discussion, collaboration and prioritization, these goals were identified:

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

Succeeding VGFOA Executive Boards should plan to prepare an annual update to this Strategic Plan by identifying progress accomplished on these steps, adding new action steps and deleting those no longer considered necessary.

| VGFOA Strategic Planning Matrix - 2010 | | | | Focus Areas | | | | | |
|--|--|---------|---------------------------------|-------------|--------------------------|------------|-----------|-------------|------------|
| Goals | Action Steps | Year | Committee(s) | Outreach | Professional Development | Membership | Education | Legislative | Leadership |
| 1 | Continue to strengthen our educational offerings | | | | | | | | |
| a | Utilize an annual report process to track attendance at various educational courses | 2011 | Education | | | | x | | |
| b | Strive to add one to two courses per year | Ongoing | Education | | | | x | | |
| c | Evaluate whether any VGFOA courses should be discontinued, modified or undergo change in course content | Ongoing | Education | | | | | x | |
| d | Strive to add one to two web-enabled courses per year | Ongoing | Education | | | | | x | |
| e | Develop a class or classes geared toward development of core accounting skills | 2012 | Education | x | x | | x | | |
| f | Evaluate whether to add "tracts" at spring or fall conferences (budget, schools, authorities) | 2011 | Conferences | | | | | x | |
| g | If Board desires to implement a tract system, determine a conference at which this can be piloted and assessed for further expansion | 2011 | Conferences | | | | x | x | |
| h | Evaluate whether to move to one conference per year | Later | Conferences | | | | | x | |
| i | Develop a method of incorporating roundtable and/or panel discussions into our conferences | 2011 | Conferences | | x | | x | | |
| j | Re-write budget course | 2012 | Education | | | | | | |
| k | Re-write human resources course | 2012 | Education | | | | | | |
| l | Expand pool of available instructors | Ongoing | Education | x | x | x | x | | x |
| m | Provide CPE credit for regional organization courses | Ongoing | Education/Regional Organization | x | | | x | | |
| 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 | 2010 | Officers | | | | | | x |
| b | Consider conflict of interest concerns that may arise from taking a stand on legislative matters | 2010+ | Board | | | | | | x |
| c | Participate in government reform discussions | 2010 | Board | | | | | x | x |
| d | Develop several initiatives the Board will pursue in upcoming general assembly | 2010 | Board | | | | | | x |
| e | Work with GFOA to understand their methodology of legislative leadership at the federal level | 2011 | Officers | | | | | | x |
| f | Evaluate merit of forming a separate Legislative committee. If so, determine appropriate leadership and membership | 2011 | Board | | | | | | x |
| 3 | Continue to strengthen regional organizations | | | | | | | | |
| a | Ensure each regional organization remains active with several events per year | Ongoing | Regional Orgs | x | x | x | x | | |
| b | Ensure each regional organization has a committee that has representation from multiple communities throughout the region | Ongoing | Regional Orgs | x | x | | | | x |
| c | Monitor regional organization interest and participation to consider need for new regions | Ongoing | Regional Orgs | x | x | x | x | | |
| d | Evaluate whether current administrative structure for regional organizations is meeting needs | Ongoing | Regional Orgs/GNAC | | | | x | | x |
| e | Evaluate the need for policy revisions based on evolution of regional organizations | Ongoing | Regional Orgs/Board | | | | | | x |
| f | Evaluate self-service web sites for regional organizations | 2011 | Communications and Technology | | | | | | |
| g | Evaluate annually the support requirements from GNAC versus the level of work done by the committees; make changes as needed | Ongoing | Regional Orgs/GNAC | x | | | | | |

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|---|--|---------|----------------------------------|-------------|--------------------------|------------|-----------|-------------|------------|
| Goals | Action Steps | Year | Committee(s) | Outreach | Professional Development | Membership | Education | Legislative | Leadership |
| 4 Advocate further the government finance professional | | | | | | | | | |
| 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 | 2011 | Awards and memberships | x | | | x | | x |
| e | Develop a method whereby Past Presidents may assist with furtherance of the government finance professional | 2011 | 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 | 2011 | Conferences/GNAC | x | x | x | | | x |
| 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 | 2011 | Awards and Memberships | x | x | x | x | | x |
| b | Decide whether the VGFOA should formally adopt values which could be advertised/marketed | 2011 | Board | x | x | | | | x |
| c | Continue preparing VGFOA responses to GASB exposure drafts | Ongoing | Legislative and standard setting | | | | | | |
| d | Continue the practice of announcing board members at the start of our annual conferences | Ongoing | President | | | | | | x |
| e | Secure different color (than black) for Past President ribbons | 2010 | Past President | x | | | | | x |
| f | Promote Virginia representation on GFOA committees and Executive Board as well as attendance at annual conference | Ongoing | Board | | | | | | x |
| 6 Expand social media | | | | | | | | | |
| a | Undertake daily or weekly posting of topics and events on Facebook to encourage participation | 2010 | Communications and technology | x | | | x | | |
| b | Continue to evaluate and expand social and professional media while ensuring we will maintain what we establish | 2011 | Communications and technology | x | x | | | | |
| c | Bring recommendations to Board concerning next steps with social media | 2011+ | Communications and technology | x | | | x | | x |
| d | Consider creating a presence on LinkedIn | 2011 | Communications and technology | x | x | | | | |
| 7 Maintain VGFOA long-term sustainability | | | | | | | | | |
| a | Develop a policy pertaining to maintenance of, use of and replenishment of VGFOA fund balance | 2011 | 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 | 2011 | 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 | 2011 | Associate member | x | | | x | | x |
| g | Develop a succession plan relative to our contract with GNAC | 2011 | Officers/Board | | | | | | x |
| h | Periodically evaluate membership fees with goals of upholding value to membership and avoiding large single year increases | Ongoing | Awards and memberships/Board | | | | x | | |
| i | Consider implementation of a "buddy system" to match first time attendees with Board members | 2011 | Awards and Memberships | x | | | x | | x |

| VGFOA Strategic Planning Matrix - 2010 | | | | Focus Areas | | | | | |
|--|--|---------|--|-------------|--------------------------|------------|-----------|-------------|------------|
| Goals | Action Steps | Year | Committee(s) | Outreach | Professional Development | Membership | Education | Legislative | Leadership |
| 8 | Continue collaborative efforts with other professional organizations | | | | | | | | |
| 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 | 2011+ | 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 | 2010+ | Education | x | | | | x | x |
| e | Collaborate and communicate with other professional organizations to include: VSCPA, TAV, VML, VACO, VFC, VASBO, VLGMA, VLGAA, Internal Audit group. | Ongoing | Board | x | x | | | x | x |
| f | Consider method of storing list serve discussion topics for future reference | 2011 | Communications and Technology | x | | | | x | x |

Superseded

2010 Update to 2008 Strategic Plan

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
-

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.

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.

Superseded

2000 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. This section examines the Board's progress in implementing the goals and objectives as denoted in the 2000 Strategic Plan, and provides the reader with a reference point for evaluating future goals as outlined in this document. The reader is reminded that Board membership changes annually, and as a result, the implementation of goals and objectives required the combined efforts of the 2000 Executive Board and the four Executive Boards that followed.

Education and Training Goals

Goal: Review and revise accounting courses and develop instructional aids and standards for our teachers. Award a Certificate of Achievement for completion of VGFOA courses.

Progress Report: VGFOA now provides a variety of classes to its members not only in the area of accounting, but also in the broader field of finance. Classes are attended by individuals from professional firms and members of the Treasurer's Association seeking the Treasurer and Deputy Treasurer Certification. In a cooperative effort with Radford University and the Treasurer's Association, the Board has developed several new courses, which include:

- Cash and Investment Management
- Leadership-Effective Communication
- Financial Administration, Risk Management, and Procurement
- Internal Controls, Auditing and Fraud
- Issuing Debt and Debt Management
- Personnel Practices
- Operating and Capital Budgeting
- Virginia Government and Law

The Board has not formerly developed standards for our instructors. However, most classes are now taught by at least one faculty member from Radford University.

The concept of awarding a certificate of achievement for completing VGFOA courses has been expanded into a certificate program. At its March 2003 meeting, the Executive Board adopted the Virginia Government Finance Officers certification program, which provides training in many job-related areas and support for those wishing to pursue the national GFOA Certified Public Finance Officer (CPFO) designation. To qualify for the VGFOA certificate, an individual must complete eight core courses and two elective courses within a five year period.

Goal: Evaluate our existing conference programs.

Progress Report: The 2000 Board was concerned that conference attendance had been declining for the previous three years. Attendance at the 1999 Spring Conference declined to approximately 100 participants. In response to this decline the Board expanded vendor, fellowship and educational opportunities at our conferences. These changes had an immediate impact and conference attendance has increased to approximately 190 participants.

Goal: Develop partnerships with other organizations to offer conferences and educational programs.

Progress Report: The Board has entered into formal and informal partnerships with Radford University, the Treasurer's Association, the State Non-Arbitrage Program (SNAP), the Weldon Cooper Center for Public Service, the Virginia Municipal League, and various private firms to provide conferences and educational opportunities for our members. Examples include SNAP's participation in the Spring Conference, our administration support agreement with Radford University, and shared educational programs with the Treasurer's Association.

Membership Goals

Goal: Increase our efforts in promoting membership

Progress Report: The Board has taken several steps to promote membership, to include the following:

- Redesigned the web site to provide a membership directory, online class and conference registration by credit card, job openings, discussion forums, and RU Financial Performance Measures.
- Developed Regional Discussion Groups
- Expanded scholarships and made it easy to register at our web site.
- Enhanced our annual conferences by providing additional opportunities for professional fellowship and education. Topics have been expanded and tailored to the ever changing environment of the finance professional.
- Created eight new classes.
- Developed a certificate program.

Goal: Devise ways of encouraging membership involvement.

Progress Report: Strategies of encouraging membership involvement include:

- Developed regional discussion groups
- Recognized Past Presidents at our Fall Conference. This is an opportunity for the Past Presidents to discuss our progress and to provide ideas for future programs.
- Added a technology position to the Board. This position and the supporting committee have played an important role in the design and development of our web site.
- Collaboration with other organizations and private firms.

Goal: Promote government service as a professional career.

Progress Report: In its efforts to promote government service as a professional career, the Board has:

- Placed job positions on our web site
- Reviewed and expanded the awards program.
- Developed a certificate program
- Developed regional discussion groups
- Promoted the GFOA Certification Program

Advocacy and the Identification of Best Practices Standard Setting Committee

Goal: Provide input to Standard Setting and Legislative Bodies on Issues Impacting Government Finance.

Progress Report: The Board and the Standard Setting Committee have established procedures for reviewing and responding to changes in Federal, GASB and State legislation and standards. A plan is in the works to email action during the 2005 General Assembly.

Goal: Promote the use of best practices in government-Executive Board

Progress Report: The Board enhanced conference topics to include a greater variety of topics, including best practices in financial and management areas.

Goal: Develop relationships with other professional organizations to achieve common goals

Progress Report: The Board has entered into formal and informal partnerships with Radford University, the Treasurer's Association, the State Non-Arbitrage Program (SNAP), the Weldon Cooper Center for Public Service, the Virginia Municipal League, and various private firms to provide conferences and educational opportunities for our members. Example include SNAP's

participation in the Spring Conference, our administration support agreement with Radford University, and shared educational programs with the Treasurer's and Commissioner's Associations.

Evaluate the Organizational Structure

Goal: Review the structure/operation of the Executive Board

Progress Report: Two positions have been added to the Executive Board since the 2000 Strategic Plan was adopted by the membership; an Education Committee Co-chair and a Technology Committee Chair. These positions have been instrumental in promoting education and enhancing our web site and the services provided to our members. Other actions taken by the Board include, the publishing of an annual calendar of events, an annual review of our fee structure, enhancing the web site, strategic planning and the administration support agreement with Radford University.

Superseded

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

VGFOA 2000 EXECUTIVE BOARD

In April, 2000 the VGFOA Executive Board met at Wintergreen, with the assistance of a facilitator, to begin a strategic planning process-to develop a plan to guide the organization to 2010. As a part of the plan, a vision statement and mission statement were developed to create the inspiration and focus for the planning process. The strategic plan was adopted by the Executive Board on September 26, 2000 and by the full membership at the 2000 Fall Conference. The 2004 Executive Board extends our gratitude to the 2000 Executive Board for foresight, dedication, and hard work.

OFFICERS AND PAST

PRESIDENT:

President

Jesse A. Hall

Deputy Director of Finance
City of Roanoke

President-Elect

Shelley Carmichael

Comptroller
County of Stafford

Vice President

William E. Johnson

Director of Finance
City of Colonial Heights

Executive Secretary-Treasurer

Judy Gough

Division Manager
County of Albemarle

Past President

Clarence D. Daniel, Jr.

Accounting Division Director
County of Henrico

Education Committee

Larry D. Clark

Financial Manager
Riverside Regional Jail Authority
County of Hopewell

Newsletter Committee

Joseph P. Casey

Director of Finance
County of Hanover

Government Finance Research Committee

Gary Ometer

Director of Debt Management
Department of the Treasury,
Commonwealth Virginia

State Representative

Mary Tuohy (Kemp)

Director of Finance
City of Herndon

COMMITTEES:

Awards and Membership Committee

Donna J. D. Rexrode

Accounting Supervisor
County of Rockingham

Superseded