



GFOA Alberta, investing in our future

GFOA Alberta

Strategic Plan 2016 – 2021

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MESSAGE FROM THE BOARD

Message from the Board

When the Government Finance Officers Association was formed over 35 years ago, the Association was essentially a single mandate committee that existed mainly to co-ordinate an annual conference for the benefit of the province’s municipal finance employees. However, a much greater role for the GFOA was realized beginning in the late 1980s and early 1990s. Effective leadership and new initiatives resulted in unprecedented membership growth. Since that time, new ideas and strategic thinking have continued to move the organization forward and we have witnessed great strides for our organization. We are especially proud of our annual conference and the training opportunities, which offer our members a wealth of networking and professional development events.

Today, our organization boasts over 900 members and serves a pivotal role in ensuring the financial well-being of local government in our province. The growth and vitality that we have realized, especially in recent years, bears witness to the ever-increasing value of our products and services. As the Board of Directors, we continue to focus our efforts in maintaining the momentum we have achieved. This strategic plan is our guiding document intended to communicate our priorities to our stakeholders and to inspire discussion among our members in a direction that will lead to future sustainability and expansion.

PURPOSE

VISION

Alberta GFOA is recognized and valued as the leading source of information and skills development resources for Alberta municipal finance leaders, managers and staff that enables them to position Alberta at the forefront of leadership in municipal finance and financial management.

MISSION

Alberta GFOA inspires and promotes excellence in municipal financial management by providing professional development and training, facilitating networking and peer relationships, and by providing guidance on emerging municipal accounting standards and financial issues, for the benefit of our members and their organizations.

VALUES

We value professionalism by embracing:

- *Integrity*
- *Accountability*
- *Openness, Transparency and Fairness*
- *Collaboration*
- *Excellence*

GOVERNANCE

THE POWER OF VOLUNTEERS DRIVES AND SUSTAINS US

With the support of GFOA Executive staff, the Board leads and coordinates by providing information and support services to Alberta municipal finance staff and their municipal organizations, through a set of task forces, staffed by committed volunteers who generously donate their knowledge and time to help advance the cause of the Association and our members.

Core functions of Communications, Emerging Issues and Professional Development are led by the Chairs of standing Task Forces. As issues arise ad hoc committees are formed, perform their work and dissolve once they have accomplished their purposes.



Governance Strategies

Overarching Goal: *GFOA is a visionary, sustainable organization, respected and trusted by Alberta Municipal financial staff as an essential source of resources to improve their effectiveness in their roles within their municipalities and advance their careers.*

Function	Goals	Metrics	Targets	Strategies
Website	Timely, relevant, accessible, value-adding information for members	Time to update input from a variety of sources (responsiveness) Flexibility in accommodating input from all sources	Next day input for all sources of data All updates	<ul style="list-style-type: none"> Effective, modern website functionality Dedicated resource with clear responsibilities
	A forum for information sharing, networking and relationship building for members	High member participation in the discussion forums	Increasing forum activity level year over year	<ul style="list-style-type: none"> Actively promote; links to the discussion forum in all communications; promote at conference
Membership	Strong participation and support by municipal organizations	Market share: Number of municipalities included	Rural – 100% Special Municipalities– 100% Cities – 100% Towns – 90% Small municipalities – 33%	<ul style="list-style-type: none"> Increase profile, branding activities to ensure high awareness Collaborate with Municipal Affairs Specialized Training focusing on important issues to members Strong, well planned, resourced membership drives Outstanding annual conference Processes to action feedback on each survey to continually improve Graduated fee schedule,
	High individual member satisfaction	Retention Member satisfaction ratings on surveys	100% of municipalities Continually increasing member satisfaction levels year over year	
Conference	The premier annual event for municipal financial professionals and staff	Participation Satisfaction	Continually increasing conference attendance and satisfaction levels year over year	

EMERGING ISSUES

MANDATE:

The Emerging Issues Task Force informs members about municipal finance matters through focused and timely information releases. The Task Force provides value to members by recognizing emerging issues and best practices in municipal finance special information releases, bulletins and through a web presence.

GOALS

The Goal of the Emerging Issues Task Force is to recognize and inform members on leading issues in local government financial management as they emerge. Success of the function is measured by the ability to release announcements on significant, relevant issues, government announcements (ie. budgets, municipal grants, financial reporting and policy changes) by making information available to members quickly and accurately.

EMERGING ISSUES STRATEGIES

Overarching Goal: *Alberta Municipal financial staff are informed on leading issues in local government financial management as they emerge.*

Function	Goals	Metrics
Government Announcements - Budgets - Grants - Program/Policy changes	Increase Member Awareness and Information on Emerging Municipal Finance Issues that Affect Them and Their Municipal Organizations	<ul style="list-style-type: none"> • Time To Release Messages to Members • Member Satisfaction With Service
Accounting Matters - PSAB, other		
Special Release		
Quarterly Updates - Informative, Value Adding Information About Municipal Finance Sector Happenings and Subjects of Interest to Members	Increase Member Awareness of What Peers Are Doing and How Common Issues are Being Dealt With in Other Municipalities	<ul style="list-style-type: none"> • Number Issued • Time to Release • Member Satisfaction With Service

COMMUNICATIONS

MANDATE:

The Communications Task Force ensures that members have access to relevant and timely information important to their careers through GFOA information releases, communications and announcements, and by enabling and facilitating networking among members to support knowledge sharing about current topics of interest.

GOALS:

The Goal of the Communications Task Force is to provide members with the best source for timely, relevant municipal finance information. We keep members informed about GFOA member services, emerging issues releases, PD opportunities and networking with other members. We provide our members with a comprehensive, complete and up to date web site that has the functionality to enable members to share information among themselves.

COMMUNICATIONS STRATEGIES

Overarching Goal: *Members rely upon GFOA as the best source for the information about municipal finance and financial management that they need when they need it.*

Functions	Goals	Metrics
Website	Timely, accessible information	Time to update
	Increased utilization	Utilization of website
	Information on website is user-friendly, accurate, current and easy to find	Website feedback (comment box on website)
Membership Drives	Sustain and grow membership	Number of renewals Number of new members
Member Surveys	Integrate feedback from members to develop or improve programs and services	Participation rate
Communication	Timely, relevant information to members	Member satisfaction
Quarterly Newsletter	Timely and impactful information	Frequency Timeliness Satisfaction

PROFESSIONAL DEVELOPMENT

MANDATE:

The Professional Development Task Force fills an important gap in the current education and skills development market for municipal financial professionals and staff today. We provide access to timely, accessible, affordable specialized training on the financial management issues that are unique to local government. We provide a dynamic, customized and flexible set of training resources directly and through partnerships with other educational institutions and professional organizations to make sure our members are knowledgeable and capable in meeting the needs of their municipalities.

GOALS:

The Goal of the PD Task Force is to make GFOA the leading source of municipal financial training and skill development tools relied upon by our membership. Our success depends on our ability to build strong, mutually successful partnerships with post-secondary education and financial professional associations and other organizations.

The PD Task Force will strive to have GFOA membership recognized by our members' employers as an essential part of their professional development plans and a key factor in advancement within their own organizations.

The PD Task Force will provide avenues for networking through the delivery of educational products.

STRATEGIES

Overarching Goal: *GFOA is the preeminent source of municipal financial management training available to and relied upon by our membership.*

Function	Goals	Metrics
Deliver training programs to members directly	GFOA is the go-to for municipal financial training for Finance staff and other municipal leadership	Courses are well attended and frequent - participation rates. Advanced courses 15-20; other courses break-even.
	Collaborate with other training bodies to share knowledge and expertise in developing programs (ie. BC GFOA, CPA Canada, Post-secondary institutions)	
	Build a certification program in "Municipal Finance".	Municipal governments support GFOA by sending new Finance staff to Fundamentals or to get certification
	Advanced Financial Leadership "academy"	All senior financial leadership in our membership should attend.
	Provide a high quality conference that adds value to all Alberta municipal financial officers	Conferences are well attended: 350 conference attendees

