



Strategic Plan

2010 - 2013



*Advancing
Government
Accountability*

AGA – New York Capital Chapter Strategic Plan

Our mission is...

to serve government accountability professionals by providing quality education at a reasonable cost, supporting professional certifications, promoting professional interaction and networking, recognizing professional and academic achievement, and serving the local community.

Our vision is to be...

- the best AGA chapter;
- the premiere organization serving the New York Capital area government accountability community; and
- a model provider of quality and affordable continuing professional education and networking opportunities.

We value...

IntegrityFoster the highest professional standards of ethical conduct and behavior.

ExcellenceStrive for the highest level of professional performance and continuous improvement.

Accountability ..Maintain and advance sound fiscal and operational practices.

LeadershipBe proactive and innovative in directing our activities.

RespectTreat everyone fairly and with dignity.

Service.....Attend to the needs of our members, the government financial sector and community.

Our goals address...

- Chapter Governance
- Financial Stability
- Continuing Professional Education
- Membership Growth and Retention
- Early Career Development
- Certification
- Community Service
- Socialization
- Recognition
- Communication
- Marketing

This long-range strategic plan is supported by annual operating plans and budgets for each area. The Chapter Executive Committee is responsible for approving and routinely monitoring these operating plans to ensure that the delivery of services to the members and government accountability community is consistent with the desired outputs and outcomes. Finally, on an annual basis, the Chapter President will report to the membership the operating results to demonstrate accountability and transparency embodied in our mission and vision.

Chapter Governance

Maintain an effective governance structure.

Assigned to: Chapter President

Ensure committees consist of sufficient qualified members to achieve their indicators for success.

Develop and implement annual operational goals, objectives and plans that aligns with the Chapter's Strategic Plan and the National Chapter Recognition Program.

Review annually how Chapter business is conducted.

Maintain and annually review the policy and procedures manual and revise as necessary.

Communicate roles and responsibilities to the members of the Chapter Executive Committee (CEC) and other committees.

Develop and implement guidance regarding relationships with other associations, National AGA and other chapters.

Develop and maintain a succession plan.

Report to the membership the results achieved for each performance indicator.

Recruit high-level government officials for Chapter support and CEC participation.

Indicators

- Achieve the maximum points that can be earned in the National Chapter Recognition Program.
- Encourage CEC members to attend at least 70 percent of all CEC meetings.
- Assign all CEC members to at least one committee.
- Recruit at least three high level government officials annually.

Financial Stability

Chapter financial resources will be used or maintained in the best interest of its membership.

Assigned to: Budget and Finance Committee and Treasurer

Prepare an annual budget that defines how Chapter funds will be deployed for the fiscal year.

Ensure that systems of internal control are adequate to protect and safeguard Chapter assets and help ensure compliance with laws and regulations.

Monitor the Chapter's financial condition by preparing and reviewing fiscal reports.

Provide the CEC with input on the impact of proposed changes to the annual budget.

Prepare the year-end financial statements and submit them for an independent review or audit as required by the CEC.

Work with the audit committee to address any recommendations from the independent review or audit.

Indicators

- Publish the Chapter's annual financial statements in the newsletter and website.
- Maintain a net fund balance of at least \$20,000.
- Produce quarterly financial summary documents and analyses for presentation at CEC meetings.
- Address audit or review recommendations within 90 days.

Continuing Professional Education

Provide training, education and development opportunities which support the needs of government accountability professionals.

Assigned to: Education Committee

Develop and implement an annual plan for continuing education based on topics that are timely and relevant to the government accountability community.

Develop a budget that generates net positive revenues to underwrite other Chapter expenses.

Sponsor and present affordable training, conferences, seminars and workshops.

Provide networking opportunities.

Partner with other professional associations to strengthen the professional education experience.

Develop and implement continuing education for targeted sectors of the government accountability community.

Develop direct participation opportunities for existing and potential members to present programs in their particular areas of expertise.

Indicators

- Provide at least 40 CPE credits annually.
- Achieve revenues that exceed expenses by at least 5%.
- Increase attendance over the prior year.
- Achieve a score of 4.0 or better out of a possible 5.0 for all training events.
- Provide at least two opportunities each year for members to make presentations.

Membership

Attract and retain a diverse and growing membership.

Assigned to: Membership Committee

Develop and implement an annual membership recruitment and retention plan.

Seek input from both Chapter members and the government accountability community to enhance the value of Chapter membership.

Research recruitment and retention best practices used by other chapters, professional associations, etc.

Establish a diversity initiative to broaden the base of membership and better reflect the composition of the government accountability community.

Maximize the use of recruitment and retention tools (brochures, announcements, etc.).

Identify and recruit individuals with particular expertise for participation in Chapter activities.

Develop a standard new member welcoming communication.

Maintain a Captains Program to help promote the Chapter and its various activities.

Indicators

- Increase members' participation in Chapter activities.
- Increase the number of agencies participating in the Advantage Group Membership Program annually.
- Increase members in all categories.
- Achieve a 90% retention rate.

Early Career Development

Promote early career membership and active participation in Chapter activities and leadership.

Assigned to: Membership Committee

Prepare and implement an annual plan.

Determine the interests of current and potential early career members related to the Chapter's activities.

Promote education, community service and social activities targeted toward early career members and potential members.

Encourage supervisors and co-workers to personally engage early career and potential early career members to participate in Chapter activities and leadership roles.

Use electronic media to target communication with early career members and potential members.

Foster mentoring and networking opportunities to involve and develop early career members.

Utilize tools provided by National AGA to recruit and retain early career members and tomorrow's professionals (i.e., students).

Indicators

- Increase early career membership 10% over the prior year.
- Increase rate of early career member participation from the prior year.
- Identify two early career members for the Chapter Executive Committee.

Certification

Promote and retain Certified Government Financial Managers (CGFM).

Assigned to: Certification Committee

Develop and implement an annual plan for aggressively marketing the value of the CGFM designation.

Encourage employers to include the CGFM credential among qualifications when hiring and promoting for financial positions.

Explore opportunities that encourage financial support toward successful completion of the CGFM examination.

Lobby the Department of Civil Service to award credit for successful completion of the CGFM examination in connection with Civil Service examinations held for selected positions.

Publicly recognize those individuals who achieved excellence in government financial management by attaining the CGFM designation.

Coordinate the access to or provision of Government Financial Management courses to the membership.

Indicators

- Increase the number of individuals that pass the CGFM examination annually.
- Increase the number of employers accepting CGFM as promotion or hiring criteria.
- Ensure that 95% of all CGFMs retain their certification.

Community Service

Promote and conduct community service activities that enhance the Chapter and the AGA's image and reputation.

Assigned to: Community Service Committee

Develop and implement an annual plan of volunteer service projects that demonstrate the Chapter's commitment to "giving something back" to the community.

Encourage Chapter members to volunteer their time and effort to community service projects.

Increase awareness of members' community service activities.

Socialization

Provide an opportunity for members to network in a relaxed atmosphere.

Assigned to: Socialization Committee

Develop and implement an annual plan for hosting various types of social activities.

Host affordable social hours after selected educational programs.

Encourage participation at sporting events or cultural activities.

Increase opportunities to partner with other professional associations to increase networking opportunities.

Work with the Membership Committee to encourage members to attend Chapter social events.

Recognition

Acknowledge contributions made by members and nonmembers that enhance Chapter activities and the government accountability community.

Assigned to: Awards Committee

Develop and implement an annual plan that recognizes contributions to Chapter activities and to the government accountability community.

Explore new ways of recognizing individual achievement in the government accountability community.

Nominate individuals for national awards given by the AGA.

Publicize the recognition of members and awardees in the media.

Indicators

- Participate in or conduct at least 10 community service projects.
- Achieve a 5% increase in total participation in at least one community service project.

Indicators

- Host at least two social events each year.
- Increase in attendance at social events over the prior year.

Indicators

- Submit at least four nominations for National awards.
- Present a local Outstanding Achievements in Government Accountability award each year.
- Celebrate Chapter contributions at least on an annual basis.

Communication

Communicate effectively with Chapter members, customers and stakeholders in an integrated and timely manner.

Assigned to: Communication Committee

Develop and implement an annual plan for communication.

Provide current information of interest to the government accountability community.

Increase the use of electronic communication and personal contact.

Use multiple methods to communicate, such as the Chapter newsletter, website, and e-mail.

Ensure that all communications are clear, concise and timely.

Produce an annual report to members (membership centric) based on input from the CEC.

Maintain a relevant and up-to-date Internet website.

Indicators

- Publish at least four newsletters annually.
- Issue broadcast e-mails announcing upcoming events and other important communications.

Marketing

Promote name recognition and Chapter events.

Assigned to: Marketing Committee

Develop and implement an annual plan for marketing.

Inform members, customers and stakeholders about AGA's and the Chapter's programs, benefits and accomplishments.

Work with local media to publicize Chapter events.

Expand market reach through various Internet postings (e.g., FaceBook, Linked-In and local professional websites).

Expand corporate sponsorship to enhance revenues.

Issue press releases.

Indicators

- Notify members and a select group of nonmembers by e-mail of every program event during the year.
- Issue press releases routinely.
- Increase revenue from sponsors.

The New York Capital Chapter of the Association of Government Accountants (AGA) serves the government financial community in the Capital Region area of New York State. This area generally encompasses Albany, Rensselaer, Schenectady, Saratoga and surrounding counties north of New York City and west to Buffalo as well as to the Canadian border. The Chapter is one of the top five chapters in the AGA with more than 300 members and is recognized as a national leader in providing continuing professional education to its members and the government financial community.

This Strategic Plan was adopted by the Chapter's Executive Committee (CEC) for the purpose of defining a clear and compelling mission, vision and values statement. The Plan also defines the goals and related strategies toward their achievement and performance indicators that measure success.

The Plan is aligned with AGA's Strategic Long-Term Plan which encompasses over 90 Chapters and some 14,000 members worldwide. It will also be used by the CEC to guide Chapter activities over the course of time towards "Advancing Government Accountability."