

TEXAS MUNICIPAL CLERKS ASSOCIATION, INC.

STRATEGIC PLAN

CHARTING TMCA, INC.'S FUTURE

Strategic planning is the process an organization follows to articulate a vision for the future and establish a direction in making decisions and allocating resources to achieve desired outcomes. It is a process that anticipates the future by defining where you want to be, how to get there, and how you know when you have arrived. Strategic planning defines an organization's philosophy and analyzes its entire business process. The strategic plan maps the future, guides decision making and resource allocation, and requires the involvement of all stakeholders.

PURPOSE AND PROCESS

This document serves as a guide for the Texas Municipal Clerks Association, Inc. (TMCA), Executive Board to develop the annual budget and provide a succinct method of articulating to staff the policy direction for TMCA and the Texas Municipal Clerks Certification Program (TMCCP). This Strategic Plan also communicates to TMCA members and TMCCP enrollees and graduates the TMCA Board's commitment to communication, collaboration, and cooperation among all TMCA members and partners. Finally, this Strategic Plan provides a road map that will encourage all Texas municipal clerks to join an outstanding organization where education, certification, and networking result in better local government across the great State of Texas.

The TMCA embarked on a strategic planning process in late 2014 to establish a pathway for the future success of our association, education and certification programs, and our profession. The TMCA Board appointed a Strategic Planning Ad Hoc Committee. The Committee's purpose was to develop a dynamic document for the TMCA Board's consideration to communicate organizational goals, the action needed to achieve those goals, and the assessment tools to know if the plan is successful to guide TMCA into the future. The Committee first completed a SWOT (strengths-weaknesses-opportunities-threats) analysis and drafted a vision statement and modifications to the existing mission statement. Then the Committee identified six broad strategic initiative areas. Goals, strategic actions, and performance measurements were then identified for each of the six strategic initiative areas.

VISION STATEMENT

The TMCA members are recognized as well educated, certified professionals who are valued members of their municipalities' leadership teams and the communities they serve.

MISSION STATEMENT

The TMCA and TMCCP are dedicated to promoting the municipal clerk profession by providing an educational and professional development program for municipal clerks.

LEADERSHIP COMMITMENT

- We will lead by example using the values of integrity, honesty, loyalty, and trustworthiness.
- We will seek what is best for the entire membership.
- We will work together as a team.

- We will deliberate openly and rationally, with creativity, while striving for consensus.
- We will provide a unified voice in all areas of importance for TMCA members.
- We will share our successes.
- We will be decisive.
- We will make decisions by listening first, gaining the facts, and then acting in accordance with our Code of Ethics.
- We will set the course for TMCA, but recognize that periodic adjustments will be required.

ORGANIZATIONAL VALUES

- Integrity at all levels
- Commitment to quality education
- Inclusive and accepting
- Culturally diverse
- Treating members equally
- Consistency in application of policies and procedures
- Open-minded, visionary, and innovative
- Pride in profession

SWOT ANALYSIS

SWOT is an acronym for Strengths-Weaknesses-Opportunities-Threats. By definition, strengths (S) and weaknesses (W) are considered to be internal factors over which the organization has some measure of control. Also by definition, opportunities (O) and threats (T) are considered to be external factors over which the organization essentially has no control, but can capitalize on and mitigate (respectively) when these are recognized. The SWOT analysis is a well-known tool for audit and analysis of the overall strategic position of a business or organization and its environment. Its key purpose is to identify the strategies that will create a business model that will best align an organization's resources and capabilities to the requirements of the environment in which it operates. It is the foundation for evaluating the internal potential and limitations and the possible opportunities and threats from the external environment. A study of this environment in which the organization operates helps in forecasting changing trends to include them in the decision-making process.

An overview of the four factors follows:

Strengths (S) – Strengths are the qualities that enable the accomplishment of an organization's mission. They serve as the basis on which continued success can be achieved and sustained. Strengths can be tangible or intangible. Strengths include areas in which you are well versed and have expertise, the traits and qualities of team members, and organizational consistency. Strengths are the beneficial aspects or capabilities of the organization, which include human competencies, committed employees and members, process capabilities, financial resources, products and services, customer goodwill, and brand loyalty.

Weaknesses (W) – Weaknesses are the qualities that prevent us from accomplishing our mission and achieving our full potential. Weaknesses deteriorate organizational success and growth and are factors that do not meet acceptable standards. Some examples are insufficient research, narrow product range, poor decision-making, lack of communication, obsolescence, etc. However, weaknesses are controllable and must be minimized and eliminated.

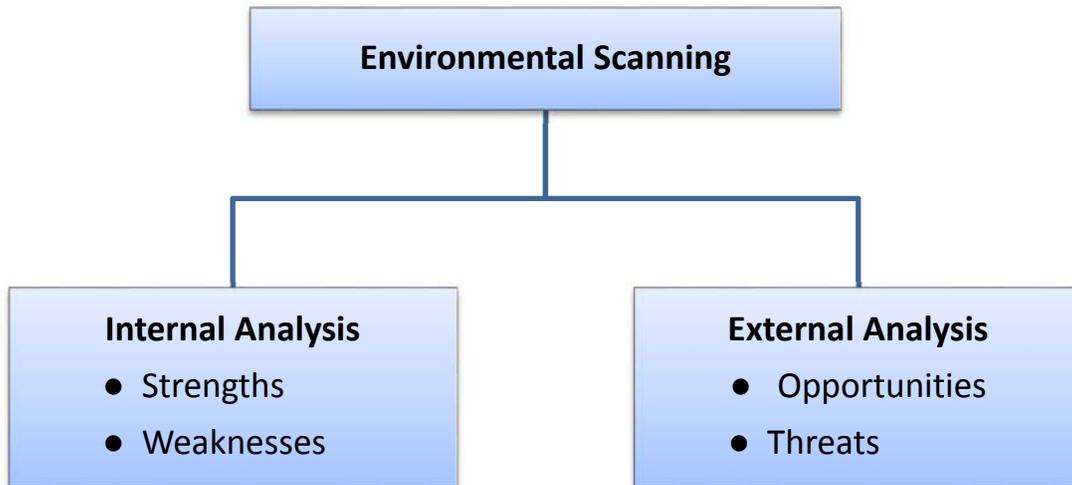
Opportunities (O) – Opportunities are presented by the environment within which an organization operates. These arise when an organization can benefit from conditions in its environment to plan and execute

strategies that enable it to become more valuable. Organizations should grasp opportunities as they arise, selecting targets that will best serve its members while obtaining desired results.

Threats (T) – Threats arise when conditions in the external environment jeopardize the reliability and success of an organization. Threats compound the vulnerability when they relate to the weaknesses. Threats are uncontrollable, and when encountered, the organization’s stability and survival can be at stake. Examples of threats are employee or member unrest, ever changing technology, increasing competition, reduced profits, etc.

A SWOT analysis helps in strategic planning in the following manner:

- It is a source of information for strategic planning.
- It identifies an organization’s strengths, weaknesses, opportunities, and threats.
- It helps identify core competencies of the organization.
- It helps in setting objectives for strategic planning.
- It helps in knowing past, present, and future so that by using current and past data, future plans can be mapped out.



The Strategic Planning Committee completed a SWOT analysis of TMCA. The results follow.

SWOT (Strengths-Weaknesses-Opportunities-Threats) ANALYSIS OF TMCA.

Strengths

- Strong Educational programs
- Education and Administrative Directors
- TMCCP Office staff
- Use of technology
- Management team
- Experience

- Knowledge of work
- Leadership
- Certifications
- History
- Legitimacy/recognition – TMCA/TMCCP are well established and respected
- Networking
- Online presence
- Ethics code/ethical compass
- Scholarships/travel
- Job board/employment listings
- Work relationships
- Proactive in responding to needs of its members (training, election calendar, other resources)
- Openness of Board members
- Strong educational opportunities
- Volunteer opportunities
- Nationally well-respected and long-tenured certification program
- Membership
- Authorized through State law
- Supported by experienced, knowledgeable staff members who provide the face of the organization
- Mentoring new city clerks
- Helping clerks gain confidence in themselves and their abilities
- Website
- Clerk's Yahoo webpage
- Networking opportunities between Board members and membership
- Getting to know membership better to develop next leaders of TMCA
- Set review or reading of policy manual by Board (being proactive)
- Membership having a voice on educational opportunities, especially for experienced clerks
- Peer mentorship program

Weaknesses

- Lack of state wide participation
- Unfamiliar with trustee nominating process
- Majority of Board meetings in Dallas
- Board has been perceived as a clique by some clerks
- Travel burden for members to seminars and trustees to meetings due to size of state
- Lack of assistance in how to make your skills and knowledge marketable and attractive when applying and interviewing
- Membership apathy within TMCA and membership benefits
- Board training
- Members may not fully understand role of TMCA Board
- No formal plan of action for the next five years

- Lack of chapter relationship building
- Keeping up with city clerk roles/responsibilities as cities change
- Potentially developing two tracks for the certification or recertification program
- Turnover in long-tenured members
- Doing things the same way because we have always done it that way
- Not being proactive, but changing policy/procedures as a reaction
- Not engaging members as they wish to be engaged
- Not expanding educational opportunities
- Keeping up with technology
- Potential change in TMCCP staff due to retirement

Opportunities

- City administrations recognizing the value of a professional municipal clerk
- Technology training for clerks
- Technological advances
- Innovation
- Changes in government politics
- Expanding network/online presence
- Training and continuing education
- Legislative/lobbying/participation/knowledge
- Recognition
- IIMC
- Accreditation
- Versatility
- Educational financing
- Developing relationships with city managers through Texas City Managers Association, (TCMA)
- Building relationships among chapters
- Association with University of North Texas (UNT)
- Members access to professionals in TMCA, TCMA, and Texas Municipal League (TML)

Threats

- Legislative changes
- Learning curve of new clerks
- Loss of institutional knowledge due to retirement
- Cities devaluing the municipal clerk position
- Opposition to change
- Changes in government politics
- Economic conditions
- New technologies
- New regulations
- Budget constraints/financial shortfalls restricting staffing and educational programming

- Distance required to travel to seminars
- Lack of peers teaching (lost with retiring clerks - need to ensure training skills are passed to next generation)
- Complacency
- Turnover in long-tenured Councils/city managers (lack of knowledge of city clerk role)
- Turnover in Vice Provost at UNT
- Lack of knowledge of what a city secretary/clerk really does
- Job perception
- Councils/city managers not understanding benefits of certification
- Lack of funding, support, awareness or knowledge about the program

The Committee spent some time reviewing the SWOT analysis input and from that discussion, formulated a vision statement and a revised mission statement for the membership and Board's consideration. Next, the Committee identified six broad strategic initiatives, with identified strategic actions and performance measurements, as follows.

STRATEGIC INITIATIVES

STRATEGIC INITIATIVE #1: PROMOTION OF TMCA – TMCA is recognized for promoting excellence in municipal clerk education and certification and for providing a professional network for sharing knowledge and best practices relative to ethical and efficient municipal government.

STRATEGIC INITIATIVE #2: PROMOTION OF MUNICIPAL CLERK EDUCATION AND CERTIFICATION THROUGH TMCCP – TMCCP provides a diversified certification program that addresses the educational needs of municipal clerks at all levels of experience.

STRATEGIC INITIATIVE #3: PROMOTION OF THE TEXAS REGISTERED MUNICIPAL CLERK (TRMC) CREDENTIAL –TRMCs are recognized by city officials and citizens as ethical professionals whose leadership and technical skills are vital to a city's success.

STRATEGIC INITIATIVE #4: PROMOTION OF THE PROFESSION – TMCA enhances and communicates the identity and vital role of the municipal clerk to a city's success.

STRATEGIC INITIATIVE #5: PARTNERSHIPS – TMCA/TMCCP cultivates, fosters, and builds partnerships with other organizations such as the Attorney General, International Institute of Municipal Clerks (IIMC), Secretary of State (SOS), Texas City Managers Association (TCMA), Texas Municipal League (TML), , University of North Texas (UNT), etc., that enhance and promote the critical role of municipal clerks.

STRATEGIC INITIATIVE #6: GOVERNANCE AND ORGANIZATIONAL STRUCTURE – TMCA fosters an environment where all members feel relevant and welcome, and the TMCA Board is responsive to the needs and desires of its members.

See Appendix A, which is a chart for the TMCA Executive Board to determine appropriate performance measures, assign task responsibilities, and timelines for completion. The goals and strategic initiatives are numbered in Appendix A for ease in tracking, but the numbering does not reflect priority.

MOVING FORWARD

It is recommended that TMCA demonstrate proactive advocacy of the municipal clerk profession. It should be a well-known fact that good municipal government requires a well-educated, well-trained municipal clerk. TMCA must continuously deliver the message that Texas Registered Municipal Clerks are essential to Texas municipal government efficiency, transparency, accountability, and effectiveness.

It must always be remembered that TMCA's strength comes from its membership. Therefore, recruitment, retention, and involvement of members is critical to TMCA's future success.

Upon adoption, TMCA will have a new, succinct Strategic Plan that sets out the vision and mission statements of TMCA. It defines leadership expectations and organizational values. It identifies six broad strategic initiative areas, with goals, strategic actions, and performance measurements relative to each. This Strategic Plan focuses on the big picture: We are doing things right. We know what will drive us in the future. We are clear about organizational goals. We are aware of accessible resources. We know how to approach and measure success. Now, implementation begins.

The Strategic Plan must be active and continuous. It is meant to be a fluid document, subject to change in response to a dynamic environment. It is a roadmap to goal attainment and allocation of resources and assets for goal achievement. The Strategic Plan requires a united community – TMCA Board, staff, members, and partners – in support of the strategy. A successful Strategic Plan is continuous with ongoing interconnected, participatory activities that build on one another. Accountability exists through identified performance measurements. Staff must be involved in the change process. The Strategic Plan serves as the basis for budget planning.

The Strategic Plan is a living document. It is recommended the TMCA, Board of Directors create a standing Strategic Planning Committee to continuously recommend updates to this Strategic Plan and monitor progress toward completion of identified goals. Timelines for completion of goals will be inserted as the organization begins implementation of the Strategic Plan. As a result of incremental implementation, the TMCA Board, staff, and committees will celebrate successes and share progress reports with the TMCA membership on a regular basis.

Respectfully submitted,

The TMCA, Inc., Strategic Planning Ad Hoc Committee

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Attachment: Appendix A

APPENDIX A
SIX IDENTIFIED STRATEGIC INITIATIVES

STRATEGIC INITIATIVE #1:	PROMOTION OF TMCA – TMCA is recognized for promoting excellence in municipal clerk education and certification and for providing a professional network for sharing knowledge and best practices relative to ethical and efficient municipal government.	Responsibility	Target Date
Goal 1:	TMCA membership is recognized as the pathway to the prestigious TRMC designation.		
Strategic Action 1:	Promote benefits of membership to councils, mayors, etc., and through the chapters so every municipal clerk is aware of the benefits of membership.		
Strategic Action 2:	Create and adopt a tag line for promotion of TMCA		
Strategic Action 3:	Promote TMCA through available media resources such as print and social media while maximizing the use of technology.		
Strategic Action 4:	Create and retain a Publicity and Marketing Committee to assist in promotion of TMCA and TMCA membership.		
Strategic Action 5:	Budget and administer an annual marketing plan with the assistance of the Publicity and Marketing Committee to promote and educate about the role of TMCA and TMCA membership.		
Strategic Action 6:	Create a new member “tool box” with resources of value to city clerks and cities, to include a Code of Ethics, signed by the TMCA President.		
Goal 2:	TMCA builds goodwill among cities by sharing municipal best practices and acting as a communication network that provides support and resources to its members.		
Strategic Action 1:	Enhance the use of technology to share information and best practices.		
Strategic Action 2:	Improve the TMCA list serve to ensure its professional integrity so it can continue to be a valuable resource for our members.		
Strategic Action 3:	Serve as an avenue for expert presenters (from among TMCA members) on topics of importance to good local government.		
Strategic Action 4:	Host resources to be used as best practices models on the TMCA website.		
Strategic Action 5:	Provide face-to-face networking opportunities for TMCA members.		
Strategic Action 6:	Publish the Texas Municipal Clerks Handbook electronically while utilizing a diversity of authors.		
Strategic Action 7:	Create a new Research and Resource Committee to provide ongoing updates to the Texas Municipal Clerks Handbook.		
Strategic Action 8:	Provide for a legal review of new editions of the Texas Municipal Clerks Handbook.		

STRATEGIC INITIATIVE #2:	PROMOTION OF MUNICIPAL CLERK EDUCATION AND CERTIFICATION THROUGH TMCCP – TMCCP provides a diversified certification program that addresses the educational needs of municipal clerks at all levels of experience.	Responsibility	Target Date
Goal 1:	Improve the content and relevancy of educational programming for all members.		
Strategic Action 1:	Develop and offer educational programs for seasoned veteran clerks who wish to enhance their advanced leadership and managerial skills.		
Strategic Action 2:	Develop and deploy diversified educational program delivery methodologies, including distance education.		
Strategic Action 3:	Offer proctored testing.		
Strategic Action 4:	Update or replace outdated curriculum and seminar structures with more relevant content and delivery platforms.		
Strategic Action 5:	Utilize technology in delivery of educational content and materials in lieu of traditional classroom/paper practices.		
Strategic Action 6:	Explore opportunities that will allow more flexibility within the re-certification program.		
Strategic Action 7:	Offer smaller “master-level” seminars/classes to address needs of advanced graduates in conjunction with other seminars.		

STRATEGIC INITIATIVE #3:	PROMOTION OF THE TEXAS REGISTERED MUNICIPAL CLERK (TRMC) CREDENTIAL –TRMCs are recognized by city officials and citizens as ethical professionals whose leadership and technical skills are vital to a city’s success.	Responsibility	Target Date
Goal 1:	Awareness of a program of higher learning that enables municipal clerks to be successful, knowledgeable, and competent leaders in their cities.		
Strategic Action 1:	Budget and administer an annual marketing plan to promote and educate the importance of a certified municipal clerk to a city, allowing for the promotion of TMCCP through available media such as print and social media while maximizing the use of technology.		
Strategic Action 2:	Promote TMCCP through TMCA chapters so every municipal clerk is aware of the certification program.		
Strategic Action 3:	Continue to educate mayors, councils, and city managers of the benefits of certified municipal clerks.		
Strategic Action 4:	Expand the role of the Technology Committee to assist in the promotion of TMCCP through the use of social media.		
Strategic Action 5:	Formalize an orientation session for new clerks and potential enrollees.		
Strategic Action 6:	Produce a promotional video on Top Ten Reasons Your Municipal Clerk Should Be Certified.		
Strategic Action 7:	Publish TRMC testimonials on the importance and value of certification.		
Goal 2:	City officials and citizens trust in the integrity and ethical conduct of their municipal clerk.		
Strategic Action 1:	Create an awards structure that recognizes the exemplary professionalism of a Texas municipal clerk and/or chapter.		
Strategic Action 2:	Create an ethics program for accountability, and employ methodologies to ensure TMCCP is recognized for its emphasis on ethics training for municipal clerks.		
Strategic Action 3:	Include the Code of Ethics in the informational packet provided by TMCCP to all new enrollees in the certification program.		

STRATEGIC INITIATIVE #4:	PROMOTION OF THE PROFESSION – TMCA enhances and communicates the identity and vital role of the municipal clerk to a city’s success.	Responsibility	Target Date
Goal 1:	The profession is advanced by well-educated municipal clerks who know their value to the success of their cities.		
Strategic Action 1:	Promote the profession through participation in Municipal Clerks Week and other year-long activities and programs.		
Strategic Action 2:	Teach succession planning implementation to TMCA members so as to promote continuity of the profession.		
Strategic Action 3:	Offer “teach the teacher” programs for TMCA members.		
Strategic Action 4:	Emphasize the importance of a professional image and proper business etiquette for a leader in local government.		
Strategic Action 5:	Emphasize to members the important role a municipal clerk performs as an officer of the municipality.		
Strategic Action 6:	Provide the career-building training necessary for municipal clerks to apply, interview for, and transition into new positions.		

STRATEGIC INITIATIVE #5:	PARTNERSHIPS – TMCA/TMCCP cultivates, fosters, and builds partnerships with other organizations such as the Attorney General, International Institute of Municipal Clerks (IIMC), Secretary of State (SOS), Texas City Managers Association (TCMA), Texas Municipal League (TML), , University of North Texas (UNT), etc., that enhance and promote the critical role of municipal clerks.	Responsibility	Target Date
Goal 1:	TMCA/TMCCP and other state, national, international, and university organizations promote and enjoy mutually beneficial partnerships		
Strategic Action 1:	Build partnerships by encouraging members to serve on available boards and committees and offering a point of resource and information for our partnering organizations.		
Strategic Action 2:	Encourage attendance at annual conferences in support of organizational partners.		
Strategic Action 3:	Participate in joint presentations and panels at conferences.		
Strategic Action 4:	Develop a TMCA members’ speakers bureau with qualified, certified clerks and seek opportunities to promote speakers from TMCA to provide training and education to city officials and other organizations such as IIMC, SOS, TML, TCMA, UNT, local civic organizations, etc.		
Strategic Action 5:	TMCA members author articles, technical bulletins, etc., for partner organizations’ publications.		
Strategic Action 6:	Place special emphasis on partnering opportunities and increased presence with the Texas City Managers Association.		
Strategic Action 7:	TMCA staff plays a critical role in partnering with other organizations.		
Goal 2:	TMCA/TMCCP, scholarship donors and seminar sponsors cultivate relationships that benefit municipal government.		
Strategic Action 1:	Increase recognition of scholarship donors and seminar sponsors.		

STRATEGIC INITIATIVE #6:	GOVERNANCE AND ORGANIZATIONAL STRUCTURE – TMCA fosters an environment where all members feel relevant and welcome, and the TMCA Board is responsive to the needs and desires of its members.	Responsibility	Target Date
Goal 1:	TMCA members are confident the TMCA Board’s actions and commitment are reflected in an inclusive, transparent organization.		
Strategic Action 1:	Establish a formal Trustee application process for consideration of nominating committee to encourage diversified representation.		
Strategic Action 2:	TMCA Board will provide a summary of each Executive Board meeting and make financial reports available online to keep members informed.		
Strategic Action 3:	Seminar survey responses will be published online.		
Strategic Action 4:	TMCA Board will consider holding Board meetings in conjunction with TMCCP seminars when at all possible to encourage member participation and to facilitate equality in Board member travel.		
Strategic Action 5:	TMCA Board welcomes member attendance at Board meetings and will receive concerns and issues through a formal written process.		
Strategic Action 6:	TMCA Board will provide opportunity for meaningful membership participation at the Annual Business Meeting through a formal written process.		
Strategic Action 7:	Proactively provide opportunities for all Board members to engage with the membership throughout the year.		
Strategic Action 8:	Require new Board member orientation (via electronic methodology if necessary) prior to first Board meeting of the year.		
Strategic Action 9:	The Advisory Management Committee (AMC) shall assume the duties of a Strategic Planning Committee and is charged with reviewing the Strategic Plan annually and providing recommendations to the TMCA Board (to be chaired by Immediate Past President).		
Goal 2:	Build relationships among TMCA Chapters.		
Strategic Action 1:	President and President Elect will hold an annual information exchange meeting for Chapter Presidents.		
Strategic Action 2:	Recognize Chapters at the Annual Business Meeting and provide an opportunity for Chapter Presidents to report on their chapters.		
Strategic Action 3:	New TMCA members are automatically given chapter information, and chapters are given new TMCA member contact information.		
Goal 3:	TMCA committees remain relevant in terms of committee structure and responsibilities.		
Strategic Action 1:	Conduct a sunset review of all TMCA committees every three years relative to composition, roles, and responsibilities to determine ongoing relevancy.		

STRATEGIC INITIATIVE #6:	GOVERNANCE AND ORGANIZATIONAL STRUCTURE – TMCA fosters an environment where all members feel relevant and welcome, and the TMCA Board is responsive to the needs and desires of its members.	Responsibility	Target Date
Strategic Action 2:	Committee composition shall represent all TMCA Chapters, when possible.		
Strategic Action 3:	Committee applications should be prominently displayed on the TMCA home page during application period.		
Goal 4:	TMCA staff is and remains a critical key to TMCA/TMCCP success.		
Strategic Action 1:	Staff is fully cross trained.		
Strategic Action 2:	Staff presents annually to the Board a list of accomplishments.		
Strategic Action 3:	A succession plan exists to address future staffing needs.		
Strategic Action 4:	Educate membership as to appropriate staff resource person for member questions.		
Strategic Action 5:	Staff utilizes technology to communicate with members and advance TMCA/TMCCP’s mission and goals.		