



ENVISION

ICMA



FY 2020 BUDGET

**ICMA**

## ABOUT ICMA

Founded in 1914, ICMA, the International City/County Management Association, advances professional local government through leadership, management, innovation, and ethics. Our vision is to be the leading professional association dedicated to creating and supporting thriving communities throughout the world.

ICMA's members are the professional city, town, and county managers who are appointed by elected officials to oversee the day-to-day operation of our communities. The association promotes and embraces diversity among its members, including a governing board that reflects ICMA's membership and the communities served.

ICMA provides member support; publications; data and information; peer and results-oriented assistance; and training and professional development to over 12,000 city, town, and county managers, their staffs, and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect millions of individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

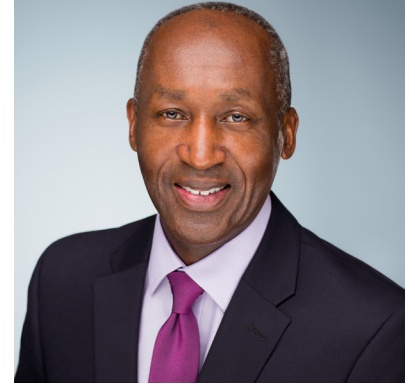
ICMA is a 501(c)(3) nonprofit organization that offers a wide range of services to its members and the local government community. It also performs mission-driven grant and contract-funded work both in the U.S. and Internationally, which is supported by federal government agencies, foundations, and corporations.

# ICMA



May 23, 2019

To: ICMA Executive Board  
From: Executive Director Marc Ott  
Re: FY 2020 ICMA Budget



Dear Members of the ICMA Executive Board:

I am pleased to recommend the FY 2020 budget for your consideration.

We are proposing a \$30.2 million operating budget. Resources are being allocated in a way that continue to propel us toward our goal of building an organization of excellence from within, while delivering on the priorities identified in Envision ICMA and generating a net excess contribution of \$685,000. In addition, the FY 2020 budget contemplates investments of \$1.15 million in key initiatives and new investments in products and services to position us for the future.

We embarked on a journey two years ago to transition and transform the way we conduct business, shaping the organization to be agile, creating a culture of innovation and excellence, while also ensuring financial resilience. While the budget is presented to reflect our current structure, we are evolving and transforming how we are organized and how we work. You can anticipate that even our approach to financial management and budget development will change over time. These changes may impact how we allocate and manage resources, and this will be reflected in the future.

This journey is about the relentless pursuit of an ideal that we refer to as “best in class”. It is a declaration we will never make about ourselves; rather, we will leave that assessment to others. And there is growing evidence of this recognition, as our team gets invited to speaking engagements, asked to educate others about our strategic plan monitoring process, and approached by organizations wanting to partner with us on their innovative solutions to issues impacting local governments.

As we assessed the fiscal health of the organization, we determined that we wanted to go beyond just providing a balanced budget to making ICMA structurally balanced and viable over the long term. To this end, we are investing in and pursuing diverse revenue sources.

Like last year, we set an aspirational tone to the budgeting process by asking each team to report on progress made and to build on their vision of “best in class”. We then budgeted the revenues for FY 2020, after which business teams determined how resources would be allocated effectively to move closer to this vision of best in class, including delivering on the priorities within Envision ICMA. These budget meetings included a cross section of staff and went beyond discussing numbers to exploring possibilities of how teams could collaborate and enhance our service offerings. Engagement from staff at all levels was inspiring and is an example of the kind of open and collaborative culture we are creating.

As I have stated before, ICMA is a complex organization. We operate as a traditional membership organization providing a wide range of services to our members. At the same time, through our grant-and contract-funded activities, we also compete with other consulting companies on projects that have an impact on communities around the world. These funded activities come with their stringent rules and regulations, and while they bring financial benefits to the organization, they also pose significant uncertainties. To mitigate these uncertainties, we are diversifying our revenue sources to reduce our reliance on this funding source.

The investments being made in local government innovations are necessary to position ICMA as a global leader in the innovations space, and also has the potential to enhance and diversify our revenue base. If these investments are successful, the goal is to completely reduce our reliance on contributions from grant- and contract-funded activities.

We are also in the midst of some major game-changing conversations, even as the FY 2020 budget is being finalized. These include renegotiating the licensing agreement and sponsorship agreement with ICMA-RC, and pursuing a sale of the building. The FY 2020 budget conservatively assumes no upside from these initiatives. I will continue to keep the board informed as we work through these issues.

I remain enthusiastic and optimistic about the future of our profession and our organization, as we position ICMA as the global leader in local government excellence. Staff and I are committed to working with all of you in the coming year, as we continue our relentless pursuit of that goal.

Sincerely,

A handwritten signature in black ink, appearing to read "Marc A. Ott". The signature is fluid and cursive, with the first name "Marc" being more legible than the last name "Ott".

Marc A. Ott  
Executive Director, ICMA

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The background of the slide features a series of concentric circles in various shades of blue, creating a ripple effect. A solid teal horizontal bar is positioned in the lower third of the slide, containing the title text. A thin teal line extends from the left edge of the slide to the start of the bar.

# BUDGET OVERVIEW

## BUDGET OVERVIEW

ICMA's strategic plan, Envision ICMA, approved by the Executive Board in February 2017, continues to serve as the foundation for all of ICMA's activities. The proposed FY 2020 budget continues our commitment to the strategic plan. The budget builds on the work accomplished to date and the implementation workplan for FY 2020, which sets forth concrete strategies for achieving the priorities identified in the strategic plan.

The FY 2020 budget includes an operating budget of approximately \$30.2 million. The resources included in the budget will continue to propel us toward our goal of building an organization of excellence from within, while delivering on the priorities identified in Envision ICMA and generating a contribution of \$685,000 to net assets.

Figure 1, FY 2020 budget summary, shows the budgeted sources of revenue and allocation of resources to strategic outcome areas.

FIGURE 1 | FY 2020 BUDGET SUMMARY

|                                                | Non-grants<br>and contracts<br>programs | Grants and<br>contracts | Organizational<br>support | Total             |
|------------------------------------------------|-----------------------------------------|-------------------------|---------------------------|-------------------|
| Revenue                                        |                                         |                         |                           |                   |
| Membership dues                                | 6,145,430                               | -                       | -                         | 6,145,430         |
| Professional development                       | 5,670,927                               | -                       | -                         | 5,670,927         |
| Publications, advertising, and<br>partnerships | 1,797,000                               | -                       | -                         | 1,797,000         |
| Management fees                                | 954,285                                 | -                       | 132,000                   | 1,086,285         |
| Royalties                                      | 2,500,000                               | -                       | -                         | 2,500,000         |
| Investment income                              | 638,000                                 | -                       | 10,000                    | 648,000           |
| Grants and contracts                           | -                                       | 13,057,154              | -                         | 13,057,154        |
| <b>Total revenue</b>                           | <b>17,705,641</b>                       | <b>13,057,154</b>       | <b>142,000</b>            | <b>30,904,795</b> |
| Operating expenses                             |                                         |                         |                           |                   |
| Member support                                 | 3,567,545                               | -                       | -                         | 3,567,545         |
| Professional development                       | 4,248,808                               | -                       | -                         | 4,248,808         |
| Research and policy                            | 1,001,861                               | -                       | -                         | 1,001,861         |
| Outreach                                       | 1,263,775                               | -                       | -                         | 1,263,775         |
| Strategic development                          | 230,871                                 | -                       | -                         | 230,871           |
| International affiliate programs               | 532,131                                 | -                       | -                         | 532,131           |
| Management services                            | 648,865                                 | -                       | -                         | 648,865           |
| Grants and contracts expenses                  | -                                       | 11,599,298              | -                         | 11,599,298        |
| Support expenses                               | -                                       | -                       | 7,126,642                 | 7,126,642         |
| <b>Total operating expenses</b>                | <b>11,493,856</b>                       | <b>11,599,298</b>       | <b>7,126,642</b>          | <b>30,219,796</b> |
| <b>Net from operations</b>                     | <b>6,211,786</b>                        | <b>1,457,856</b>        | <b>(6,984,642)</b>        | <b>685,000</b>    |

Total revenue included in the FY 2020 operating budget is approximately \$30.9 million. The FY 2020 budgeted revenue is discussed in greater detail in the “Revenue Estimates” section of this document.

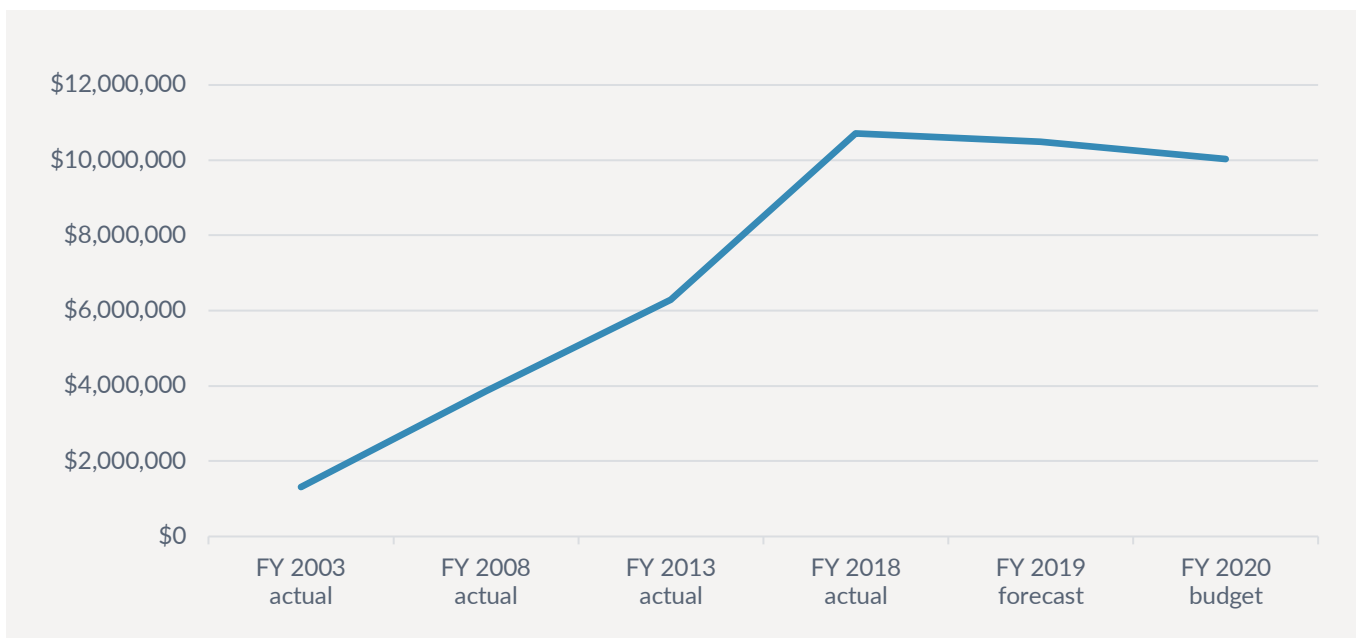
FY 2020 budgeted operating expenses, in the amount of approximately \$30.2 million, are allocated to strategic outcome areas, which are organized to deliver on the priorities and strategies of Envision ICMA. The “Expense Estimates” section of this document provides additional details regarding the FY 2020 allocation of resources.

As illustrated in Figure 1, net contribution from operations included in the FY 2020 budget is \$685,000, which would increase the balance of ICMA’s net asset reserves to approximately \$11.2 million.

However, to position ICMA for the future, we have made strategic decisions regarding key initiatives and new investments in products and services. These important investments and initiatives will require resources in FY 2020, which will be funded from net assets rather than from the operating budget. These items are detailed in the “Direct Uses from Net Assets” section of this document.

With these assumptions, net assets balance is expected to be at approximately \$10 million at the end of FY 2020, as shown in Figure 2.

FIGURE 2 | NET ASSETS BALANCE, 2003-2020





## REVENUE ESTIMATES

Figure 3 shows the FY 2020 budgeted sources of revenue from operations.

FIGURE 3 | FY 2020 BUDGETED SOURCES OF REVENUE FROM OPERATIONS

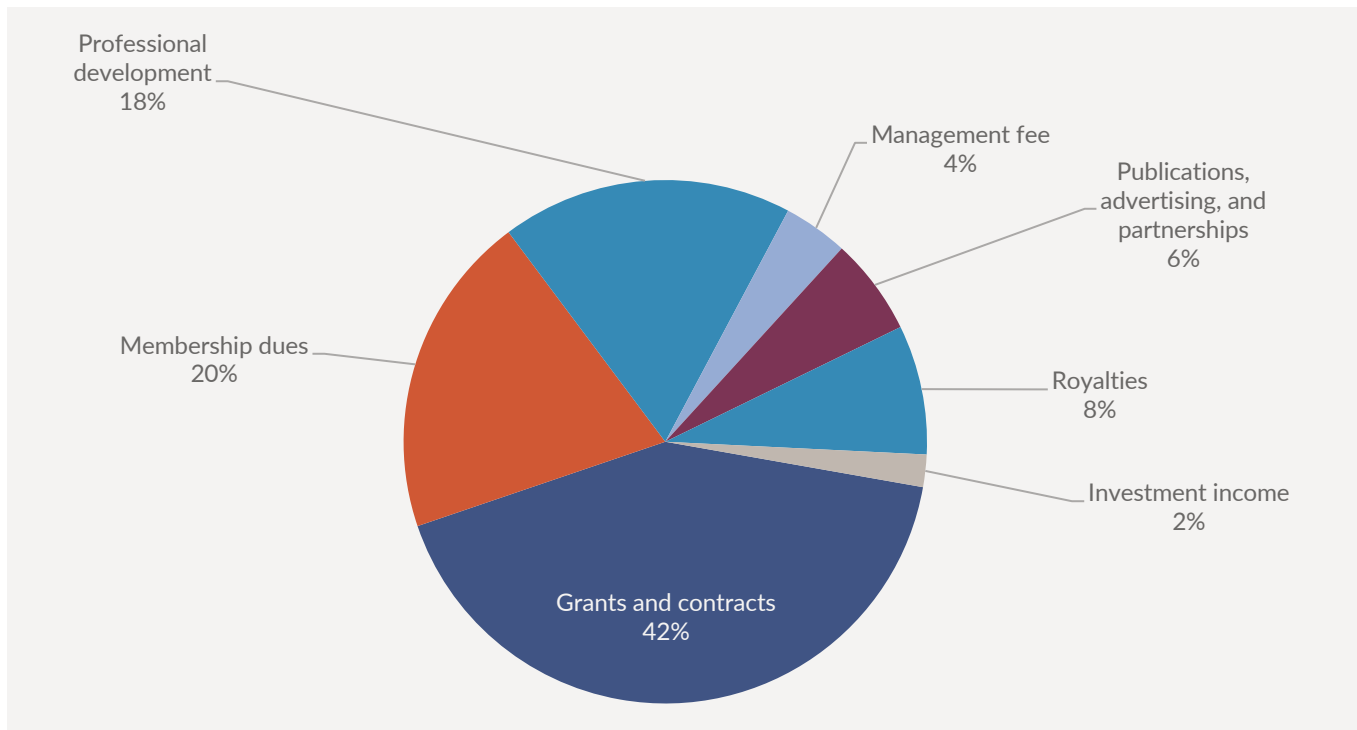


Figure 4 provides further detail on the composition of FY 2020 revenue, compared with FY 2018 actual and FY 2019 budgeted revenue.

FIGURE 4 | REVENUE FROM OPERATIONS

| Revenue sources                             | FY2018<br>actual  | FY2019<br>budget  | FY2020<br>budget  |
|---------------------------------------------|-------------------|-------------------|-------------------|
| Revenue from operations                     |                   |                   |                   |
| Membership dues                             | 5,749,802         | 5,980,000         | 6,145,430         |
| Professional development                    | 4,931,774         | 5,321,665         | 5,670,927         |
| Publications, advertising, and partnerships | 1,546,663         | 1,725,500         | 1,797,000         |
| Management fees                             | 978,679           | 1,015,563         | 1,086,285         |
| Royalties                                   | 2,518,706         | 3,400,000         | 2,500,000         |
| Investment income                           | 728,815           | 502,700           | 648,000           |
| Grants and contracts                        | 12,484,804        | 13,225,929        | 13,057,154        |
| <b>Total revenue from operations</b>        | <b>28,939,242</b> | <b>31,171,357</b> | <b>30,904,795</b> |

**Membership dues**, budgeted based on the current dues structure, are expected to grow by 2.77% compared with FY 2019. This reflects the combined effect of growing salaries of the full member population and the increasing membership count, which is a positive result of the implementation of the flat dues rate for department directors and other successful recruitment strategies.

**Professional development** consists of the annual conference, regional conferences, the credentialing program, online learning, local government training, and other management and leadership programs offered to local government professionals at all career stages. Annual conference revenue reflects a projected 5% increase in paid attendance, modest increases in registration fees, and increases in revenue from conference sponsorships. Revenue from other professional development offerings is budgeted to be higher than in FY 2019, due to higher budgeted sponsorships related to regional conferences.

**Publications, advertising, and partnerships**, which include sales of print and electronic publications, advertising and sponsorships for ICMA's content, and revenue from the strategic partner and preferred provider programs, are projected to grow compared with FY 2019, due to an expected increase in revenue from sponsored research activities, as well as expected sponsorships for the National Brownfields Conference, scheduled to take place in December 2019.

**Management fees** consist of revenue derived from management and administrative services provided to certain organizations, including National Association of County Administrators (NACA) and Center for State and Local Government Excellence (SLGE). These revenues are budgeted at approximately the same level as in FY 2019.

**Royalties** include licensing fees from ICMA-RC for the use of ICMA's name and brand, and are budgeted at the amount consistent with the agreement between ICMA and ICMA-RC currently in place. As ICMA and ICMA-RC engaged in discussions related to renegotiating the licensing agreement, in FY 2019 the budget included an additional amount of revenue, based on the expectation that the negotiations would conclude in FY 2019 and would result in additional revenue of at least \$900,000. Since the negotiations are taking longer than anticipated, the FY 2020 budget makes no assumptions on the outcome of the negotiations, and, instead, includes the amount in line with the current agreement.

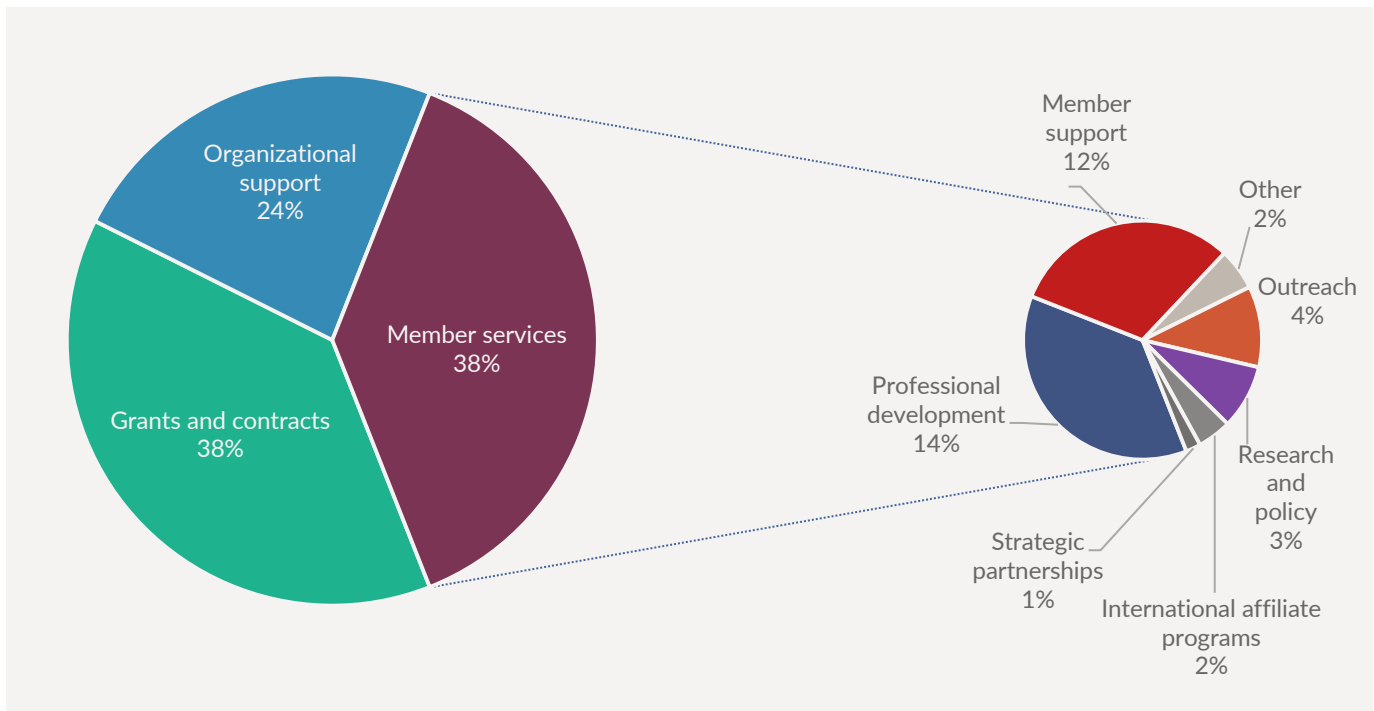
**Investment income** consists of the annual Real Estate Investment Trust (REIT) dividend distribution, as well as interest and other earnings from ICMA's investments. Revenue from these sources is budgeted at the same level as in FY 2019.

**Grants and contracts** revenue is budgeted at approximately \$13 million. The two largest projects in ICMA's grants and contracts portfolio, Strengthening Urban Resilience for Growth with Equity in the Philippines and Local Effective Governance Activity in Kosovo, are expected to generate approximately 50% of the total grants and contracts revenue.

## EXPENSE ESTIMATES

Figure 5 shows the allocation of resources to three major outcome areas of ICMA's operations: member services, grants and contracts, and organizational support. In addition, member services are further broken down into member support, professional development, strategic partnerships, international affiliate programs, research and policy, outreach, and other.

FIGURE 5 | FY 2020 ALLOCATION OF RESOURCES TO OUTCOMES



The FY 2020 budget includes resources to maintain ongoing operations and services and to deliver on the key priorities identified in Envision ICMA. In addition, the FY 2020 budget includes investment in staff's professional development and recognition programs, and an average 3% increase in compensation levels, in line with prior years.

Figure 6 further details the FY 2020 budgeted allocation of resources to various outcome areas, as compared with FY 2018 actual results and FY 2019 budget.

FIGURE 6 | ALLOCATION OF RESOURCES TO OUTCOMES

| Outcome areas                    | FY2018<br>actual | FY2019<br>budget | FY2020<br>budget |
|----------------------------------|------------------|------------------|------------------|
| Member services                  |                  |                  |                  |
| Member support                   | 3,335,544        | 3,610,828        | 3,567,545        |
| Professional development         | 2,999,339        | 3,658,812        | 4,248,808        |
| Research and policy              | 913,420          | 1,060,195        | 1,001,861        |
| Outreach                         | 1,312,652        | 1,444,666        | 1,263,775        |
| Strategic development            | 229,425          | 295,623          | 230,871          |
| International affiliate programs | 711,596          | 742,833          | 532,131          |
| Management services              | 548,336          | 589,560          | 648,865          |
| Total member services            | 10,050,312       | 11,402,517       | 11,493,856       |
| Grants and contracts             | 10,667,142       | 12,376,025       | 11,599,298       |
| Organizational support           | 7,052,608        | 6,924,755        | 7,126,642        |
| Total operating expenses         | 27,770,062       | 30,703,297       | 30,219,796       |

## DIRECT USES FROM NET ASSETS

In addition to maintaining ongoing operations and services, the FY 2020 budget identifies resources needed to make investments in new products and services, as well as other key initiatives, which are to be funded directly out of net assets rather than from ongoing operations. Figure 7 provides detail on budgeted revenue and expenses related to these items.

FIGURE 7 | DIRECT USES FROM NET ASSETS

| Direct uses from net assets             | Revenue | Expenses  | Net         |
|-----------------------------------------|---------|-----------|-------------|
| Local government innovation initiatives | 318,300 | 763,570   | (445,270)   |
| ICMA Europe                             | 27,750  | 87,710    | (59,960)    |
| Executive Board diversity initiative    | -       | 45,000    | (45,000)    |
| ICMA office space                       | 572,993 | 1,170,463 | (597,470)   |
| Total direct uses from net assets       | 919,043 | 2,066,743 | (1,147,700) |

**Local government innovation initiatives:** The FY 2020 budget includes investments related to developing a new line of products and services designed to help local governments implement innovative practices while generating a financial benefit to ICMA over time.

**Continued investment in ICMA Europe:** In accordance with the Executive Board's initiative to establish ICMA's presence in Europe with the purpose of advancing ICMA's mission on a global scale, the FY 2020

budget includes continued funding for ICMA Europe for the second year of its operations. The board has committed to support ICMA Europe at the level of up to \$100,000 per year for two years.

**One-time expense related to the Executive Board diversity initiative:** The FY 2020 budget includes a one-time expense related to an additional meeting of ICMA's Executive Board, to be held in the summer of 2019, dedicated to its initiative of increasing diversity on the board.

**ICMA office space:** ICMA leases 49,419 square feet in the headquarters building, of which ICMA occupies 26,388 square feet and subleases 23,031 square feet to other organizations, including ICMA-RC. Subleases to ICMA-RC for approximately 14,200 square feet are scheduled to end in June and in December of 2019. Given the uncertainty related to the future of ICMA's ownership in the building, the FY 2020 budget includes rent revenue and expense based on a conservative assumption that, while ICMA will continue to incur rent expense for the space vacated by ICMA-RC, this space will remain unoccupied once subleases expire and will not generate rent revenue. This assumption represents the "worst case" scenario. Actual results will be impacted by the outcomes of the building owners' decisions related to a possible sale of the building, as well as other strategies that we are currently pursuing.

## COMPARATIVE BUDGET

Figure 8 presents the FY 2020 proposed budget in comparison with the FY 2018 actual results and the FY 2019 budget.



FIGURE 8 | FY 2020 BUDGET COMPARED WITH FY 2018 ACTUAL AND FY 2019 BUDGET

|                                                      | FY2018<br>actual | FY2019<br>budget | FY2020<br>budget |
|------------------------------------------------------|------------------|------------------|------------------|
| Non-grants and contracts programs                    |                  |                  |                  |
| Revenue                                              |                  |                  |                  |
| Membership dues                                      | 5,749,802        | 5,980,000        | 6,145,430        |
| Professional development                             | 4,931,774        | 5,321,665        | 5,670,927        |
| Publications, advertising, and partnerships          | 1,546,663        | 1,725,500        | 1,797,000        |
| Management fees                                      | 846,679          | 883,563          | 954,285          |
| Royalties                                            | 2,518,706        | 3,400,000        | 2,500,000        |
| Investment income                                    | 719,909          | 500,000          | 638,000          |
| Total revenue from non-grants and contracts programs | 16,313,532       | 17,810,728       | 17,705,641       |
| Program expenses                                     |                  |                  |                  |
| Member support                                       | 3,335,544        | 3,610,828        | 3,567,545        |
| Professional development                             | 2,999,339        | 3,658,812        | 4,248,808        |
| Research and policy                                  | 913,420          | 1,060,195        | 1,001,861        |
| Outreach                                             | 1,312,652        | 1,444,666        | 1,263,775        |
| Strategic development                                | 229,425          | 295,623          | 230,871          |
| International affiliate programs                     | 711,596          | 742,833          | 532,131          |
| Management services                                  | 548,336          | 589,560          | 648,865          |
| Total program expenses                               | 10,050,312       | 11,402,517       | 11,493,856       |
| Net from non-grants and contracts programs           | 6,263,220        | 6,408,211        | 6,211,786        |
| Grants and contracts                                 |                  |                  |                  |
| Revenue                                              | 12,484,804       | 13,225,929       | 13,057,154       |
| Expenses                                             | 10,667,142       | 12,376,025       | 11,599,298       |
| Net from grants and contracts                        | 1,817,661        | 849,904          | 1,457,856        |
| Organizational support                               |                  |                  |                  |
| Revenue                                              | 140,907          | 134,700          | 142,000          |
| Expenses                                             | 7,052,608        | 6,924,755        | 7,126,642        |
| Net from organizational support                      | (6,911,701)      | (6,790,055)      | (6,984,642)      |
| Direct uses from net assets                          |                  |                  |                  |
| Local government innovation initiatives              | -                | -                | (445,270)        |
| ICMA Europe                                          | (57,764)         | (21,780)         | (59,960)         |
| Board diversity initiative                           | -                | -                | (45,000)         |
| Office space                                         | -                | (250,000)        | (597,470)        |
| Other one-time items                                 | 22,665           | (84,867)         | -                |
| Direct uses from net assets                          | (35,098)         | (356,647)        | (1,147,700)      |
| Total net contribution to (use from) net assets      | 1,134,082        | 111,413          | (462,700)        |

Figure 9 shows the full-time equivalent positions (FTEs) budgeted for FY 2018, FY 2019, and FY 2020.

**FIGURE 9 | BUDGETED FTEs, FY 2018-2020**

|                                               | FY2018<br>actual | FY2019<br>budget | FY2020<br>budget |
|-----------------------------------------------|------------------|------------------|------------------|
| Non-grants and contracts programs             |                  |                  |                  |
| Member support                                | 16.32            | 16.57            | 16.20            |
| Professional development                      | 10.50            | 11.24            | 10.85            |
| Research and policy                           | 4.62             | 4.79             | 4.66             |
| Outreach                                      | 7.51             | 8.07             | 6.32             |
| Strategic development                         | 1.21             | 2.08             | 1.39             |
| International affiliate programs              | 2.08             | 2.23             | 1.37             |
| Management services                           | 3.47             | 3.24             | 3.48             |
| Total non-grants and contracts programs       | 45.70            | 48.22            | 44.27            |
| Total grants and contracts                    | 28.02            | 23.33            | 23.45            |
| Organizational support                        | 18.73            | 19.16            | 19.70            |
| Total operations                              | 92.45            | 90.72            | 87.42            |
| Compensated absences                          | 13.46            | 13.44            | 13.94            |
| One-time items                                | -                | -                | 1.56             |
| Total compensated absences and one-time items | 13.46            | 13.44            | 15.50            |
| <b>Total FTEs</b>                             | <b>105.90</b>    | <b>104.16</b>    | <b>102.92</b>    |

## RISKS AND OPPORTUNITIES

The FY 2020 budget includes several items of revenue and expense with inherent financial risk, as well as items that present potential opportunities. These items, which may materially affect actual results, include:

- Royalty revenue is budgeted based on the licensing agreement with ICMA-RC that is currently in place. The future levels of royalty and sponsorship revenues expected from ICMA-RC are uncertain, as the two organizations continue to renegotiate the licensing agreement for the use of ICMA's name and brand based on an independent valuation study done in FY 2019, as well as the value of sponsorship opportunities ICMA provides to ICMA-RC.
- The amount of ICMA's investment in office space is unknown at this time. The budget includes rent revenue and expense based on the lease and sublease agreements currently in place. However, as ICMA, together with the other owners of the building, contemplate the future of their ownership in the building and occupancy needs, actual financial impact of this area remains highly uncertain.

- The level of attendance for the Nashville conference may be lower than budgeted, affecting conference revenues adversely. In addition, the annual conference and regional conferences include sponsorship revenue targets that are reflective of ICMA's aggressive efforts to increase sponsorship opportunities at all ICMA events.
- The FY 2020 budget includes an initial investment in developing a new line of products and services designed to help local governments implement innovative practices while generating a financial benefit to ICMA over time. This new line of products and services is an example of the kinds of entrepreneurial activities ICMA is engaging in to be responsive to the current and future needs of its members and their communities. Since this is the first year of this activity, it represents both a financial risk and an opportunity to generate a return on investment for ICMA in the future.

In addition, grants and contracts (G&C) revenue, which accounts for 42% of total ICMA budgeted revenue from operations, carries several risks:

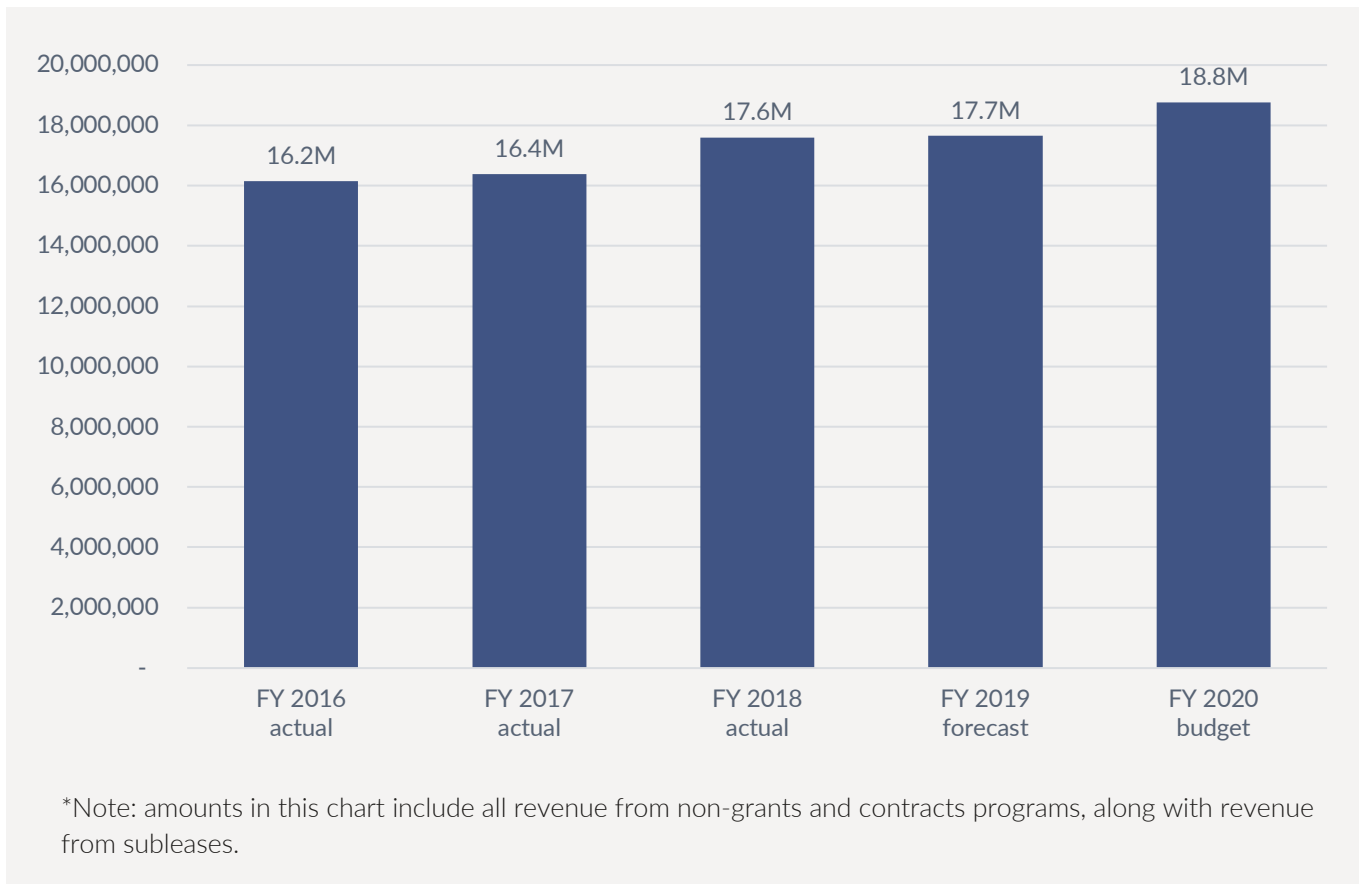
- Continued reliance on funding from one primary source, USAID, for international G&C work is an area of high risk, as this funding source is volatile, highly competitive, influenced by changing political environments and other factors outside of ICMA's control, and requires investment of resources in business development, contract administration, and compliance activities.
- Risks associated with federal audits of funded programs continue to be high. Any potential cost disallowances by federal agencies may result in ICMA having to resort to using funds from net assets in order to resolve these audits.
- Budgeted revenues from grants and contracts typically include projects in hand and an unfunded portion for projects we expect to win during the year. The amount of unfunded G&C revenue included in the budget is approximately \$1.5 million, or 11% of the total budgeted G&C funding and 5% of total ICMA budgeted revenue. The unfunded amount fluctuates each year based on awards in hand and our average win rate applied to outstanding or pending proposals.

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## RISK MITIGATION

ICMA employs several measures to mitigate against the risks described above, including:

- Continual monitoring of progress against key financial and programmatic metrics, and making course adjustments as needed.
- Investment in compliance and training activities to reduce risks of program audit findings.
- Investment in business development and bids and proposals, to ensure a pipeline of new funded projects that are expected to close the funding gap and help realize revenue currently budgeted as unfunded.
- Pursuit of new sources of revenue and enhanced revenue from existing sources to reduce reliance on G&C funding. This strategy has been successful, as revenues from the non-G&C sources increased from approximately \$16.2 million in FY 2016 to approximately \$18.8 million budgeted in FY 2020, as shown in Figure 10.

**FIGURE 10 | REVENUE FROM NON-GRANTS AND CONTRACTS SOURCES\***

## FINANCIAL GOALS

### NET ASSETS

Net assets represent accumulated earnings of an organization and are increased or decreased as a result of annual operating surpluses or deficits. It is a measure of an organization's long-term financial stability and capacity and is calculated as assets less liabilities. Net assets are built to help manage transitions and to make investments in the future as necessary.

The median net assets balance of nonprofit organizations, as reported by the American Society of Association Executives, is approximately 50% of the average operating budget.

ICMA's Executive Board establishes an overall net assets goal as well as interim net assets targets in five-year increments. These targets are reviewed and adjusted annually based on actual performance. The overall net assets are further divided into reserves for specific purposes, to ensure availability of funds for various kinds of risks and opportunities.

The interim net assets target established by ICMA's Executive Board for FY 2023 is \$10.3 million. This target was established with the understanding that, while the better-than-budgeted contributions to net assets over the past several years helped grow ICMA's net assets, the organization is now poised to make needed investments in new initiatives and to fund opportunities. ICMA continues to make annual contributions to net assets from its operations, and in FY 2020 that contribution is budgeted to be in the amount of \$685,000. At the same time, as the budget includes \$1,147,700 in investments and one-time expenses that will be funded directly out of net assets rather than from operations, the net assets balance at the end of FY 2020 is expected to be approximately \$10 million, as illustrated in Figure 11.

FIGURE 11 | NET ASSETS: ACTUAL VS. TARGET, FY 2003-2020

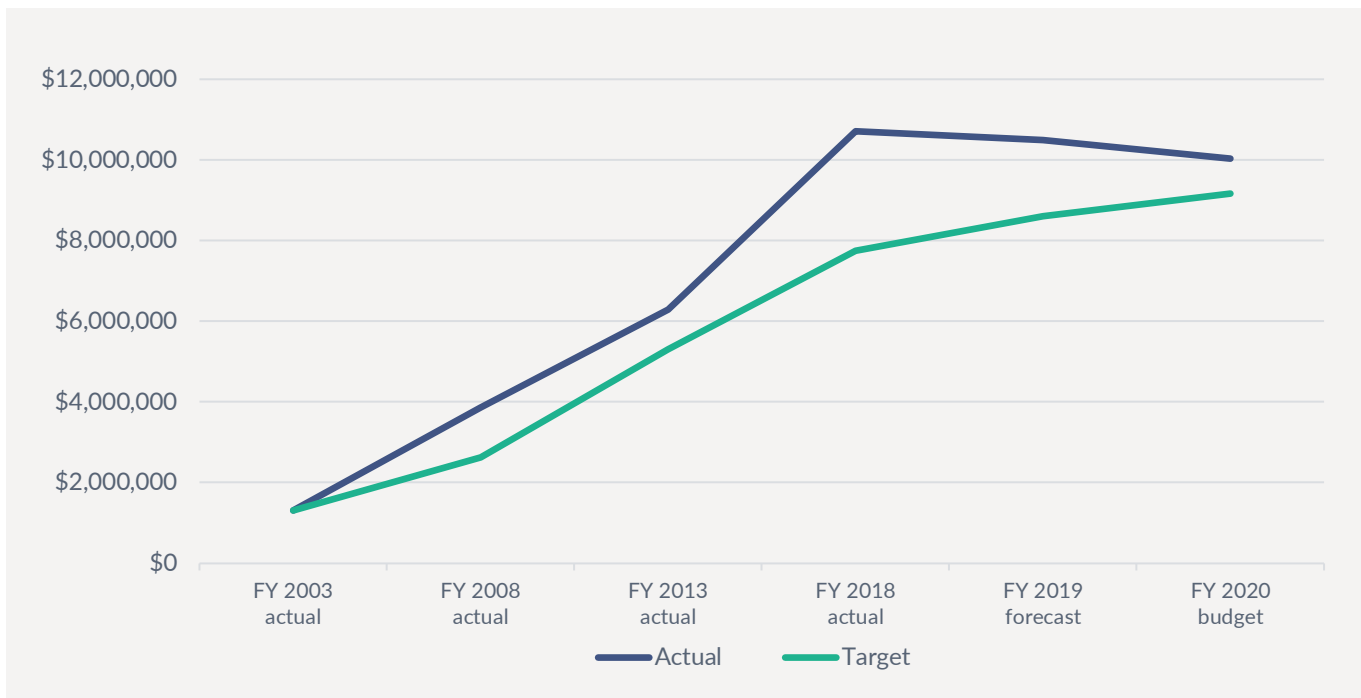


Figure 12 shows the overall net assets goal, the incremental target for FY 2023, and the projected net assets balance for FY 2020.

**FIGURE 12 | NET ASSETS GOALS, BALANCES, AND TARGETS**

| Composition of net assets                                               | Net assets goal (long-term) | FY2023 net assets target | FY2020 net assets balance (projected) |
|-------------------------------------------------------------------------|-----------------------------|--------------------------|---------------------------------------|
| Reserve for non-G&C operating expenses (6 months)                       | \$9,114,500                 | \$5,985,000              | \$5,829,000                           |
| Reserve for investments                                                 | 3,000,000                   | 1,971,000                | 1,919,000                             |
| G&C reserve (2.5% of total awards)                                      | 2,568,000                   | 1,687,000                | 1,642,000                             |
| Reserve for other one-time items                                        | 1,000,000                   | 657,000                  | 640,000                               |
| <b>Total</b>                                                            | <b>\$15,682,500</b>         | <b>\$10,300,000</b>      | <b>\$10,030,000</b>                   |
| Net assets as a percentage of average annual expenses of \$31.4 million | 50%                         | 33%                      | 32%                                   |
| Net assets balance as a percentage of net assets goal                   |                             | 67%                      | 64%                                   |

## CASH AND INVESTMENTS

The cash reserves goal (which is different from the net assets goal) includes operating cash and investments reserves to provide ICMA with the resources needed to continue delivery of its programs in the event of delayed payments from funders, to prevent ICMA from making expensive short-term crisis-based decisions, and to enable ICMA to focus on sound long-term decision making. The minimum cash reserve suggested by the Nonprofit Operating Reserves Initiative Workgroup is 25%, or three months, of the annual operating expense budget. ICMA's cash and investments balance is projected to be at 39% of the annual operating expense budget at the end of FY 2020.

## CAPITAL INVESTMENTS AND DEPRECIATION

As part of the annual budgeting process, capital investments are reviewed to determine the equipment, software, and other capital assets that must be placed in service or replaced over the next three years. Capital expenditures are depreciated over the useful life of the asset. Decisions about financing capital investments are based on available and required operating cash and reserves. Currently, ICMA has no investments that are financed through debt arrangements, as it has used its available cash to fund existing capital investments.

ICMA is in the process of determining the most economically advantageous option with respect to modernizing its office space, with the goal of creating an office environment that fosters creativity and



collaboration and increases productivity. Depending on the outcome of this process, a capital investment related to this project may be needed. Accurate estimates of such an investment are not available at this time and therefore are not included in the FY 2020 budget.

Figure 13 shows the existing capital assets and investments projected to be made in FY 2019 – FY 2021, with the related depreciation costs.

**FIGURE 13 | CAPITAL ASSETS ACQUISITION AND DEPRECIATION**

| Capital asset                              | Acquisition year | Cost      | Useful life | Depreciation expense |                |                |
|--------------------------------------------|------------------|-----------|-------------|----------------------|----------------|----------------|
|                                            |                  |           |             | FY2019               | FY2020         | FY2021         |
| Furniture                                  | FY 2002-2016     | 90,121    | 10          | 7,349                | 7,349          | 7,349          |
| <b>SUBTOTAL Furniture</b>                  |                  |           |             | <b>7,349</b>         | <b>7,349</b>   | <b>7,349</b>   |
| Voice over IP (VOIP) project               | FY 2014          | 353,720   | 7           | 50,531               | 50,531         | 25,266         |
| IT hardware                                | FY 2015-2018     | 408,045   | 3-5         | 54,630               | 34,445         | 18,089         |
| Stutz conference room audio upgrade        | FY 2016-2017     | 35,501    | 7           | 5,288                | 5,288          | 5,288          |
| IT infrastructure upgrade                  | FY 2018          | 246,533   | 5           | 49,307               | 49,307         | 49,307         |
| Conference room smartboards                | FY 2020          | 200,000   | 5           | -                    | 20,000         | 40,000         |
| IT hardware                                | FY 2019          | 84,231    | 3           | 13,915               | 27,830         | 27,830         |
| IT hardware                                | FY 2020          | 95,000    | 3           | -                    | 15,167         | 30,333         |
| IT hardware                                | FY 2021          | 85,000    | 3           | -                    | -              | 14,167         |
| <b>SUBTOTAL IT Hardware</b>                |                  |           |             | <b>173,671</b>       | <b>202,568</b> | <b>210,280</b> |
| Website redesign                           | FY 2016-2019     | 365,049   | 2-5         | 49,768               | 54,302         | 54,302         |
| Sharepoint                                 | FY 2015-2017     | 87,540    | 7           | 12,506               | 12,506         | 12,506         |
| Association management software (netFORUM) | FY 2013-2021     | 2,522,287 | 10          | 242,630              | 265,781        | 293,811        |
| Software upgrades and enhancements         | FY 2015-2019     | 280,830   | 3-7         | 36,823               | 41,454         | 35,002         |
| Software upgrades and enhancements         | FY 2020          | 425,000   | 7           | -                    | 30,357         | 60,714         |
| Software upgrades and enhancements         | FY 2021          | 320,000   | 7           | -                    | -              | 22,857         |
| <b>SUBTOTAL Software</b>                   |                  |           |             | <b>341,726</b>       | <b>404,400</b> | <b>479,192</b> |
| Leasehold improvements                     | FY 2016-2017     | 156,694   | 10          | 15,688               | 15,688         | 15,688         |
| <b>SUBTOTAL Leasehold Improvements</b>     |                  |           |             | <b>15,688</b>        | <b>15,688</b>  | <b>15,688</b>  |
| <b>TOTAL</b>                               |                  |           |             | <b>538,435</b>       | <b>630,006</b> | <b>712,509</b> |

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# TEAM PRIORITIES AND BUDGETS

## FY 2020 TEAM PRIORITIES AND BUDGETS

With membership at its core, ICMA is organized in teams focused on delivering key resources, products, and services worldwide in support of its mission. The directors of each of these teams form ICMA's Leadership Team.



The following pages describe the FY 2020 priorities, budgeted revenues, expenses, net contribution, and full-time equivalent positions for each of these teams. A detailed workplan with linkages to Envision ICMA can be found in Appendix 1.

## MEMBER SERVICES AND SUPPORT

### MISSION

To attract individuals to the local government management profession, recruit local government professionals in all positions and career stages to join ICMA, and provide excellent services and benefits throughout their career in public service. This team works in partnership with state and other affiliated organizations to advance this mission.

### FY 2020 PRIORITIES

- Assist talented individuals in gaining entry into the profession.
- Expand and diversify ICMA membership.
- Improve and sustain collaborative relationships with state and affiliate organizations.
- Promote equity and inclusion.
- Promote a global commitment to ethics and enhance ethics awareness.
- Expand efforts to inform members about the role of the Executive Board and its election process.

### FY 2020 BUDGET – MEMBERSHIP DUES REVENUE

|                         | FTEs | Revenues     | Expenses | Net       |
|-------------------------|------|--------------|----------|-----------|
| Membership dues revenue | -    | \$ 6,145,430 | -        | 6,145,430 |

Dues revenue is budgeted assuming a 2.77% increase compared with the FY 2019 budget. Dues revenue is used to fund such various areas as member services and support, outreach, research and policy, and international affiliate programs.

### FY 2020 BUDGET – MEMBER SERVICES AND SUPPORT

|                                            | FTEs  | Revenues     | Expenses  | Net         |
|--------------------------------------------|-------|--------------|-----------|-------------|
| Member recruitment, retention, and support | 8.06  | \$ 30,000    | 1,426,610 | (1,396,610) |
| Ethics                                     | 1.07  | 10,000       | 244,879   | (234,879)   |
| Career services                            | 3.48  | 665,000      | 635,564   | 29,436      |
| Relationship management                    | 3.29  | 64,494       | 923,006   | (858,512)   |
| Executive Board                            | 0.30  | -            | 337,485   | (337,485)   |
|                                            | 16.20 | 769,494      | 3,567,545 | (2,798,051) |
| Allocation of membership dues              | -     | 2,798,051    | -         | 2,798,051   |
|                                            | 16.20 | \$ 3,567,545 | 3,567,545 | -           |

This budget includes expenses related to member recruitment, retention, and personal support, as well as member committees, ethics programs, affiliate relationships, next generation activities, and expenses related to the Executive Board. As in prior years, these programs are projected to generate some revenues, such as sponsorships for events and fees for certain services. While these revenues cover a portion of the total costs related to member services and support, the rest of these expenses are covered by an allocation of membership dues.

## PROFESSIONAL AND LEADERSHIP DEVELOPMENT

### MISSION

To develop and enhance the leadership and management capacity of members and local government professionals through a comprehensive array of high-quality programs delivered in a variety of formats to address needs of various career stages.

### FY 2020 PRIORITIES

- Recruit and retain members through professional development programs.
- Hold an energizing and successful annual conference.
- Enhance the content, format, and reach of the regional conferences.
- Continue implementing the Leadership Task Force recommendations.
- Continue to improve the credentialing program.
- Continue and expand programming on diversity and inclusion.
- Maintain and build on existing professional development programs.
- Expand professional development offerings globally.

### FY 2020 BUDGET

|                                                 | <u>FTEs</u>  | <u>Revenues</u>     | <u>Expenses</u>  | <u>Net</u>     |
|-------------------------------------------------|--------------|---------------------|------------------|----------------|
| Annual conference                               | 3.70         | \$ 3,148,051        | 2,488,931        | 659,120        |
| Training, education, and leadership development | 7.15         | 1,592,676           | 1,759,877        | (167,201)      |
|                                                 | <u>10.85</u> | <u>\$ 4,740,727</u> | <u>4,248,808</u> | <u>491,919</u> |

Included in this budget are the annual conference and other professional development offerings, such as ICMA University workshops, ICMA Credentialing Program, webinars, assessments, senior managers' and emerging leaders' programs, as well as new product development and marketing expenses. As in the past, the annual conference is projected to make a substantial positive net contribution, a portion of which will be used to cover the expenses of other professional development programs.

## RESEARCH AND POLICY

### MISSION

To position ICMA as a thought leader with respect to trends and issues affecting local governments and to conduct research and develop information resources important to local government professionals and government leaders.

### FY 2020 PRIORITIES

- Conduct national surveys and other research and produce useful research-based content.
- Manage ICMA's digital and print publications business line.
- Advocate for public policy issues as they impact local governments and ICMA's members.
- Produce public policy thought leadership content.

### FY 2020 BUDGET

|                               | FTEs | Revenues     | Expenses  | Net       |
|-------------------------------|------|--------------|-----------|-----------|
| Public policy                 | 0.61 | \$ -         | 135,517   | (135,517) |
| Research and content          | 4.05 | 745,000      | 866,344   | (121,344) |
|                               | 4.66 | 745,000      | 1,001,861 | (256,861) |
| Allocation of membership dues | -    | 256,861      | -         | 256,861   |
|                               | 4.66 | \$ 1,001,861 | 1,001,861 | -         |

This budget includes activities aimed at responding to public policy issues impacting local government, managing ICMA's publications, and conducting research and producing content on local government policies and practices. Some of the research is sponsored by external sources. The balance is funded through the allocation of membership dues.

## OUTREACH

### MISSION

To build awareness and the reputation of ICMA and the profession globally through effective packaging and dissemination of local government thought leadership content, leading to increased demand for membership, partnerships, and resources.

### FY 2020 PRIORITIES

- Develop and disseminate high-value content and resources.
- Optimize outreach channels.
- Expand the way ICMA delivers its message.
- Maintain the website as a highly effective local government leadership, management, and ICMA brand hub.
- Promote member collaboration and networking through the ICMA Connect Network.
- Ensure an effective online presence for ICMA through the website, mobile apps, and social media channels.
- Promote ICMA thought leadership through media and content partners.
- Build awareness of the importance of the CAO role and the council-manager form of government.
- Attract and retain talented professionals as ICMA members.

### FY 2020 BUDGET

|                               | FTEs | Revenues     | Expenses  | Net       |
|-------------------------------|------|--------------|-----------|-----------|
| Form of government/advocacy   | 0.40 | \$ -         | 57,310    | (57,310)  |
| PM Magazine                   | 1.24 | 166,000      | 378,928   | (212,928) |
| Outreach and communications   | 4.68 | 176,000      | 827,537   | (651,537) |
|                               | 6.32 | 342,000      | 1,263,775 | (921,775) |
| Allocation of membership dues | -    | 921,775      | -         | 921,775   |
|                               | 6.32 | \$ 1,263,775 | 1,263,775 | -         |

Outreach includes ICMA's activities related to raising awareness of ICMA's brand and content, as well as the advocacy efforts for the council-manager form of government. As in the past, the FY 2020 budget includes revenues expected to be generated from offering advertisement space in ICMA's communications channels, such as the website and PM magazine. The rest of the budgeted expenses are covered by an allocation of membership dues.



## CORPORATE AND DONOR RELATIONS

### MISSION

To generate business opportunities/innovations that boost membership value and foster professional local government management by identifying, securing, and partnering with organizations whose missions align with ICMA's strategic goals.

### FY 2020 PRIORITIES

- Maintain a strong network of strategic partners who work with ICMA on content and provide financial support.
- Begin performing a comprehensive analysis of the current Strategic Partner program and its benefits.
- Begin evaluating all of ICMA's assets and services to effectively market corporate sponsorship opportunities.
- Evaluate the needs of the ICMA members and the benefits the strategic programs can provide to meet those needs.
- Encourage contributions to ICMA's Future of Professional Management fund.

### FY 2020 BUDGET

|                                    | FTEs | Revenues   | Expenses | Net     |
|------------------------------------|------|------------|----------|---------|
| Strategic partners and fundraising | 1.39 | \$ 710,000 | 230,871  | 479,129 |

Corporate and donor relations include various partnerships and sponsorships, as well as fundraising activities. As in prior years, in FY 2020 these activities are projected to result in a net contribution.

## GLOBAL PROGRAMS

### MISSION

To deliver high-quality technical assistance to local governments globally and to encourage sharing and replication of leading practices through peer exchanges and hands-on, practical training. To forge strategic partnerships with local government associations worldwide to further ICMA's mission globally by exchanging knowledge and best practices and collaborating on research and business ventures.

### FY 2020 PRIORITIES

- Begin to conceptualize and develop a five-year global engagement action plan that identifies key initiatives to help ICMA create a worldwide learning network of local government professionals.
- Create engagement opportunities for members in countries around the world.
- Implement funded programs efficiently and effectively, in compliance, on budget, and on time.
- Strengthen relationships with international affiliates and partners.
- Expand ICMA's research, professional development programs, and services globally.
- Ensure a global perspective in all of ICMA's activities and offerings.

### FY 2020 BUDGET

|                                             | FTEs  | Revenues      | Expenses   | Net         |
|---------------------------------------------|-------|---------------|------------|-------------|
| Grants and contracts                        | 13.08 | \$ 13,057,154 | 9,662,294  | 3,394,860   |
| Team management and contract administration | 5.35  | -             | 886,272    | (886,272)   |
| Business development, bids, and proposals   | 5.02  | -             | 1,050,732  | (1,050,732) |
| Total grants and contracts                  | 23.45 | 13,057,154    | 11,599,298 | 1,457,856   |
| International affiliates and partnerships   | 1.37  | 214,000       | 532,131    | (318,131)   |
|                                             | 24.82 | \$ 13,271,154 | 12,131,429 | 1,139,725   |

Global programs include international and domestic grants and contracts activities, together with the related support costs, such as team management, contract administration, and business development expenses aimed at securing future funding. As in prior year, grants and contracts are projected to make a net contribution in FY 2020. In addition, this budget includes activities related to strengthening ICMA's relationships with international affiliates and partners.

## ORGANIZATIONAL SUPPORT

### MISSION

The organizational support teams provide the business teams with the people, technology, space, and resources needed to achieve their priorities and meet their performance objectives. The support teams are charged with ensuring organizational sustainability and an integrated commitment to the mission, vision, and core beliefs of the association.

### FY 2020 PRIORITIES

- Ensure ICMA's financial resiliency.
- Ensure alignment of teams' priorities to the strategic plan and support their achievement.
- Pursue opportunities to enhance ICMA's revenues.
- Ensure that ICMA's work space is reflective of who we aspire to be and is a place that inspires creativity, productivity, and innovation.
- Position ICMA as a thought leader in innovation as it relates to associations and local governments.
- Ensure effective use of data from all systems through business intelligence and data analytics.
- Ensure efficient operations of support teams to provide timely and reliable services.
- Review and automate processes to enhance efficiencies.
- Ensure compliance with laws and regulations.
- Ensure a clean FY 2019 annual audit.
- Increase recruiting effectiveness.
- Build the ICMA employer brand.
- Retain staff by providing fair compensation, competitive benefits, an engaging orientation program, and ongoing career development opportunities.
- Ensure that all information technology infrastructure is effective, robust, and secure.
- Ensure that applications are being utilized effectively across the organization.

### FY 2020 BUDGET

|                               | FTEs         | Revenues          | Expenses         | Net                |
|-------------------------------|--------------|-------------------|------------------|--------------------|
| Executive office              | 3.33         | \$ -              | 1,246,527        | (1,246,527)        |
| Facilities and administration | 1.51         | 132,000           | 1,886,304        | (1,754,304)        |
| Finance                       | 7.29         | 10,000            | 1,238,338        | (1,228,338)        |
| Information technology        | 5.41         | -                 | 2,067,338        | (2,067,338)        |
| Human resources               | 2.18         | -                 | 688,135          | (688,135)          |
|                               | <u>19.70</u> | <u>\$ 142,000</u> | <u>7,126,642</u> | <u>(6,984,642)</u> |

This budget reflects support provided to the organization by the administrative and financial services teams.

## OTHER

## CENTER FOR STATE AND LOCAL GOVERNMENT EXCELLENCE (SLGE) MANAGEMENT

ICMA provides staffing to the Center for State and Local Government Excellence (SLGE) for management and oversight. SLGE reimburses ICMA for all direct and related indirect costs incurred in providing this support.

## ICMA-RC ROYALTY

In accordance with a licensing agreement with ICMA-RC, ICMA-RC pays ICMA a royalty for the use of the association's name and brand. Currently, the annual payment is calculated as 1.15% of ICMA-RC's consolidated gross revenues up to \$200 million, plus .75% of such revenues in excess of \$200 million. The FY 2020 budget includes an estimate of royalty revenue based on the agreement currently in place.

## REIT DIVIDEND AND OTHER INVESTMENT INCOME

Real Estate Investment Trust (REIT) dividend is the income expected from ICMA's investment in the building. The FY 2020 budget includes an estimate of the REIT dividend based on the REIT net income projections for calendar year 2019.

Investment income is the earnings estimated on operating cash reserves.

## FY 2020 BUDGET

|                   | FTEs        | Revenues            | Expenses       | Net              |
|-------------------|-------------|---------------------|----------------|------------------|
| SLGE management   | 3.48        | \$ 900,991          | 648,865        | 252,126          |
| ICMA-RC royalty   | -           | 2,500,000           | -              | 2,500,000        |
| REIT dividend     | -           | 550,000             | -              | 550,000          |
| Investment income | -           | 88,000              | -              | 88,000           |
|                   | <u>3.48</u> | <u>\$ 4,038,991</u> | <u>648,865</u> | <u>3,390,126</u> |

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**APPENDIX 1**  
ENVISION ICMA  
IMPLEMENTATION  
PLAN, FY 2020

## APPENDIX 1: ENVISION ICMA IMPLEMENTATION PLAN, FY 2020

# MISSION & VISION

## MISSION

To advance professional local government through leadership, management, innovation, and ethics.

## VISION

To be the leading association of local government professionals dedicated to creating and sustaining thriving communities throughout the world.

# CORE BELIEFS

## WE BELIEVE IN:

1. **PUBLIC SERVICE:** including the stewardship of democratic principles and the efficient and transparent use of public resources
2. **ETHICS:** as the core of professionalism in local government leadership and management as outlined in the ICMA Code of Ethics
3. **COUNCIL-MANAGER FORM OF GOVERNMENT AND PROFESSIONAL MANAGEMENT:** as the preferred local government structure
4. **EQUITY AND INCLUSION:** ensuring that local governments are inclusive and mirror the diversity in communities
5. **THE CONTINUOUS PURSUIT OF EXCELLENCE:** including professional development, life-long learning, networking, capacity building, knowledge sharing, and engagement
6. **STEWARDSHIP:** balancing resources including people, financial, social capital, and environmental so that communities are better than we found them
7. **LEADERSHIP:** developing leadership capacity and attracting and developing future generations of leaders.



PRIORITY I:

# Membership Benefits and Growth



STRATEGIC INITIATIVE A:

## Diversify and expand the membership

| Strategy Number | Strategies                                                                                                                                                         | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A.1             | Maintain an organizational priority to grow and retain the membership in order to support local government's ability to attract and retain talented professionals. | <ul style="list-style-type: none"><li>• Continue growing ICMA membership through the following initiatives:<ul style="list-style-type: none"><li>○ Conduct targeted state campaigns to build state and ICMA membership.</li><li>○ Implement the Members on the Move initiative to ensure that vacant CAO and ACAO positions are filled by ICMA members.</li><li>○ Pursue every lead through the Leave No Lead Behind initiative.</li><li>○ Promote the Join, Go, Save! initiative to attract nonmembers to attend the annual conference and join ICMA.</li></ul></li><li>• Enhance the professional awards program by highlighting award recipients throughout the year using various ICMA channels.</li><li>• Expand the local government awareness campaign "Why I Do It."</li></ul> |
| A.2             | Implement board approved recommendations of the Task Forces on Diversity & Inclusion and Women in the Profession.                                                  | <ul style="list-style-type: none"><li>• Strengthen the selection process for the ICMA Executive Board to encourage diversity and inclusion.</li><li>• Engage the student chapters in promoting the importance of diversity and inclusion within the profession.</li><li>• Partner with the League of Women in Government (LWG), ICMA members, and recruiting firms to develop RFP language to deter gender bias and inappropriate questions during interviews by elected officials and manager candidates.</li><li>• Continue to offer content and training to advance equity and inclusion in the profession and workforce.</li></ul>                                                                                                                                                 |

| Strategy Number | Strategies                                                                                                                                                       | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A.3             | Develop strategies to assist talented individuals in gaining entry into the profession.                                                                          | <ul style="list-style-type: none"> <li>• Continue to conduct outreach to colleges and universities to increase awareness of the profession and demonstrate the value of ICMA membership at the earliest stages of engagement.</li> <li>• Expand the Veterans Local Government Management Fellowship program with more installation agreements and participants.</li> <li>• Recruit city and county managers and assistants to partner with ICMA and student chapters to mentor all students.</li> <li>• Continue to provide members and their organizations with qualified applicants, while creating opportunities for students and early career professionals, by focusing on helping them build their career-starting and advancing skills.</li> <li>• Enhance the civics education program by publishing a K-12 coloring book; creating a new subsite to promote curriculum, teaching resources, speaker resources, and more; and developing an undergraduate career guide.</li> <li>• Continue to enhance Job Center capabilities and marketing.</li> <li>• Develop an ICMA University marketing strategy targeting students set to graduate.</li> </ul> |
| A.4             | Define and promote the value of belonging to ICMA in addition to State Associations, International and other Affiliates, and related professional organizations. | <ul style="list-style-type: none"> <li>• Work with affiliate organizations on the recruitment strategy, identify recruitment opportunities, and develop a marketing campaign designed to promote joint membership.</li> <li>• Ensure that all affiliation agreements have annual workplans to advance mutually beneficial programs.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| A.5             | Support the professional and personal needs of members at all life and career stages.                                                                            | <ul style="list-style-type: none"> <li>• Enhance offerings for members in different career stages through the following initiatives:               <ul style="list-style-type: none"> <li>○ Provide toolkit, resources, and other specific content for first-time administrators; build a cohort of first-time administrators on the ICMA Connect Network.</li> <li>○ Redesign the member center web section by function to provide function-specific content.</li> </ul> </li> <li>• Expand the Senior Advisor Program and celebrate its 45-year history.</li> <li>• Enhance the Members in Transition (MIT) program through the following initiatives:</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |



| Strategy Number | Strategies                                                                                                                                               | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 |                                                                                                                                                          | <ul style="list-style-type: none"> <li>○ Provide reputational management services to MITs.</li> <li>○ Create a new e-version of <i>Hitting the Beach</i>.</li> <li>○ Develop resources specific to interim and contract work.</li> <li>○ Provide support and services to members in transition who are ineligible for the MIT program.</li> <li>● Enhance ethics awareness through the following initiatives: <ul style="list-style-type: none"> <li>○ Develop a second edition of an e-book focusing on the ICMA Code of Ethics.</li> <li>○ Develop a member-only webinar series.</li> <li>○ Develop an online ethics course to increase awareness of the ICMA Code of Ethics.</li> <li>○ Develop case studies to be used in training.</li> <li>○ Contribute content through the ICMA blog and <i>PM</i> magazine.</li> </ul> </li> <li>● Support the new Deputy/Assistant Advisory Board and its efforts to build a digital career toolkit.</li> <li>● Provide more scholarships for members to attend ICMA professional development and to access offerings of affiliate organizations.</li> <li>● Maintain existing highly rated programs that cover all career stages from early career to encore professional (Annual Conference, Regional Conferences, ELDP, Leadership ICMA, MCMI, ICMA SEI, Gettysburg, and Williamsburg).</li> <li>● Conduct Athenian Project, a senior executive program to encourage giving back to the profession.</li> <li>● Launch new Art and Science of Leadership program.</li> <li>● Partner with the Kettering Foundation to deliver <i>Making Democracy Work</i>.</li> </ul> |
| A.6             | Continue to expand the relevance of Student Chapters and their respective universities to highlight career opportunities in local government management. | <ul style="list-style-type: none"> <li>● Maintain support and growth of student chapters by increasing chapter engagement and promotion.</li> <li>● Engage with student chapters for content development and connection.</li> <li>● Develop a “global vision” for student chapters’ engagement and growth.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

| Strategy Number | Strategies                                                                                                                                  | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                 |
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| A.7             | Work with elected official organizations to develop and implement training to facilitate the increase of a more diverse pool of executives. | <ul style="list-style-type: none"> <li>• Work with the LWG and Government Alliance on Race and Equity (GARE) to develop an effective strategy for engaging with elected official organizations.</li> <li>• Develop crossover online learning events that can be either co-produced or co-marketed with at least one elected official organization.</li> </ul>                                       |
| A.8             | Identify and promote member services that are relevant to the international community.                                                      | <ul style="list-style-type: none"> <li>• Promote a global commitment to ethical conduct by expanding ethics training to make it relevant on the global stage, recognizing cultural and regional differences.</li> <li>• Offer ethics training opportunities to international affiliates.</li> <li>• Identify opportunities to serve members through support to international affiliates.</li> </ul> |

## STRATEGIC INITIATIVE B:

## Improve and sustain collaborative relationships with international and state associations and affiliates to support, align, and advance common goals.

| Strategy Number | Strategies                                                                                                                                    | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| B.1             | Strengthen and formalize relationships with organizations that have similar missions to leverage resources for the benefit of the profession. | <ul style="list-style-type: none"> <li>• Continue to develop partnerships with organizations that have a similar mission to ICMA.</li> <li>• Develop and implement annual workplans with each affiliate to advance mutually beneficial programs.</li> <li>• Support the creation of a Puerto Rican commonwealth association for local government leadership and management professionals.</li> </ul> |

| Strategy Number | Strategies                                                                                                                                                                                                                   | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| B.2             | Expand the Regional Directors so that at least one director covers each region to foster relationships with international and state associations and the general membership.                                                 | <ul style="list-style-type: none"> <li>Incorporate regional directors in more ICMA programs to provide a connection to members where they are.</li> </ul>                                                                                                                                                                                                                             |
| B.3             | Establish deeper relationships with international, state associations and affiliate membership organizations to develop a leadership pipeline to serve on the ICMA Executive Board.                                          | <ul style="list-style-type: none"> <li>Develop annual workplans focused on collaboration to support mutual goals and engagement.</li> </ul>                                                                                                                                                                                                                                           |
| B.4             | Enhance communication and dialogue to develop synergistic relationships with international, state, and affiliate organizations and other professional associations.                                                          | <ul style="list-style-type: none"> <li>Continue to strengthen engagement with ICMA's existing affiliate organizations and begin a campaign to recruit new affiliate partners.</li> <li>Offer ethics training to state and affiliate organizations, including international affiliates.</li> </ul>                                                                                     |
| B.5             | Explore and establish relationships with non-traditional organizations that could serve as partners in achieving ICMA's diversity goals.                                                                                     | <ul style="list-style-type: none"> <li>Provide scholarships to underrepresented groups to attend leadership development programs.</li> <li>Continue outreach to Historically Black Colleges and Universities and Hispanic Serving Institutions.</li> <li>Establish new affiliate agreements with International Network of Asian Public Administrators and CivicPride.</li> </ul>      |
| B.6             | Advance work with IHN, NFBPA, and NACA and other organizations on establishing joint recruitment goals and recruitment opportunities and amend the national affiliate agreements as appropriate to further our shared goals. | <ul style="list-style-type: none"> <li>Update and renew agreements to ensure that they reflect an annual workplan that advances mutual interests.</li> <li>Partner with affiliate organizations on ICMA programs to build membership and the profession.</li> <li>Contribute and share content on websites and other communication channels and at conferences and events.</li> </ul> |



## PRIORITY II

# Learning Community

### STRATEGIC INITIATIVE C:

**Create a worldwide learning community of local government professionals and provide training programs for all career stages.**

| Strategy Number | Strategies                                                                                    | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| C.1             | Expand learning opportunities and professional development for members at every career stage. | <ul style="list-style-type: none"><li>• Maintain existing highly rated programs that cover all career stages from early career to encore professional (Annual Conference, Regional Conferences, ELDP, Leadership ICMA, MCMI, ICMA SEI, Gettysburg, and Williamsburg.</li><li>• Conduct Athenian Project, a senior executive program to encourage giving back to the profession.</li><li>• Launch new Art and Science of Leadership program.</li><li>• Partner with the Kettering Foundation to deliver <i>Making Democracy Work</i>.</li><li>• Utilize features of the new online learning management platform to increase member satisfaction ratings.</li><li>• Use ICMA's NetFORUM database and the new online learning management platform to track individuals' participation in professional development programs, as well as their buying patterns, to help market offerings most effectively.</li><li>• Work with the Credentialing Advisory Board to explore the possibility of a tiered approach to the Credentialing Program.</li></ul> |

| Strategy Number | Strategies                                                                                                                                   | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| C.2             | Create opportunities for individuals with diverse career backgrounds to engage in training and professional development on local government. | <ul style="list-style-type: none"> <li>• In partnership with Living Cities, create new content and training on innovation strategies related to local government management policies, programs, and partnerships for diverse and inclusive communities.</li> <li>• In partnership with the U.S. Environmental Protection Agency and numerous peer organizations, continue to offer the National Brownfields Conference, one of America's largest conferences on economic development, environmental revitalization, and creating more sustainable communities.</li> </ul>                                                                                                                                                                                                      |
| C.3             | Create learning opportunities for members to share experiences from countries around the world.                                              | <ul style="list-style-type: none"> <li>• Continue to identify ICMA members to provide technical assistance on international and domestic funded programs.</li> <li>• Continue to manage an effective international exchange program in partnership with the U.S. Department of State and ICMA member-led communities.</li> <li>• Support the ICMA Europe initiative to expand ICMA's reach, brand awareness, programming, and thought leadership across the continent and to grow membership.</li> <li>• Implement a realistic and effective workplan for activities in China and reassess the opportunities for a long-term viable business plan.</li> <li>• Assess the needs of international audiences with regard to online professional development offerings.</li> </ul> |
| C.4             | Create a mechanism for mutual exchange of best practices.                                                                                    | <ul style="list-style-type: none"> <li>• Utilize ICMA Connect Network to give members the ability to share best practices.</li> <li>• Create sessions, workshops, and other opportunities to exchange best practices at ICMA conferences and events.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| C.5             | Further expand the ICMA coaching program and Local Government Management Fellowship program.                                                 | <ul style="list-style-type: none"> <li>• Solidify ICMA's ownership and management of the coaching program by fully integrating it into ICMA staff responsibilities.</li> <li>• Grow the Local Government Management Fellowship (LGMF) program: <ul style="list-style-type: none"> <li>○ Expand placements.</li> <li>○ Promote the option for a city and a county to share a fellow.</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                     |
| C.6             | Continue to create professional development content on management practices.                                                                 | <ul style="list-style-type: none"> <li>• Work with the Leadership Advisory Board to develop a three-year plan for the continued expansion of ICMA online certificate programs, providing a clear path from the fundamentals to state-of-the-practice and state-of-the-art.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

| Strategy Number | Strategies                                                                                                                   | FY 2020 initiatives                                                                                                                                                                                                                                         |
|-----------------|------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| C.7             | Consider ways to market ICMA's professional development programs to local government professionals who are not ICMA members. | <ul style="list-style-type: none"> <li>Employ a broad range of electronic, social media, print, and referral marketing tactics designed to reach nonmembers.</li> <li>Add/update ICMA professional development programs on the GoArmyEd website.</li> </ul> |
| C.8             | Develop mechanisms to evaluate the effectiveness and impact of professional development programs.                            | <ul style="list-style-type: none"> <li>Continue to evaluate all programs in terms of member satisfaction and continue to gather and use stories about effectiveness and impact.</li> </ul>                                                                  |

## STRATEGIC INITIATIVE D:

## Think globally, act globally.

| Strategy Number | Strategies                                                                                                     | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------|----------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D.1             | Develop coordinated strategy to increase brand awareness of ICMA and its benefits to international affiliates. | <ul style="list-style-type: none"> <li>Continue the Around the World blog series highlighting international affiliates and other ICMA global connections.</li> <li>Create an e-book using collected content.</li> </ul>                                                                                                                                                                                                                         |
| D.2             | Promote international awareness and perspective of the local impact of globalization.                          | <ul style="list-style-type: none"> <li>Continue to incorporate case studies from around the world where feasible in all ICMA research-based content.</li> <li>Broadly share stories that connect to ICMA research and case studies through all channels, especially podcasts.</li> <li>Create and disseminate stories about the impact of ICMA's global technical assistance programs.</li> </ul>                                               |
| D.3             | Develop a more robust learning network of US and International members.                                        | <ul style="list-style-type: none"> <li>Conceptualize and develop a five-year global engagement action plan that identifies key initiatives to help ICMA create a worldwide peer-to-peer learning network of local government professionals.</li> <li>Continue to manage relationships with ICMA's international affiliate organizations, including retention of existing partners and recruitment of new country-based associations.</li> </ul> |

| Strategy Number | Strategies                                                                                                                | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 |                                                                                                                           | <ul style="list-style-type: none"> <li>Continue to improve existing programming involving ICMA's international affiliate organizations and members.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| D.4             | <b>Sustain ICMA's technical assistance globally to foster professional management and create sustainable communities.</b> | <ul style="list-style-type: none"> <li>Conduct business development activities designed to attract federal agencies, philanthropic funders, and other partnering organizations aligned with ICMA's technical assistance goals and objectives.</li> <li>Produce new marketing materials highlighting ICMA's technical assistance capabilities and participate at events where potential funders and partners congregate.</li> <li>Continue to develop data, content, and other knowledge resources that can foster derivative products and services and that can be used to bolster ICMA's technical assistance goals.</li> <li>Leverage knowledge, staff experience, and content to implement programs that benefit communities worldwide through technical assistance, training, city-to-city partnerships, peer learning, and research.</li> </ul> |



## STRATEGIC INITIATIVE E:

**Ensure future-ready leaders by providing thought leadership for the emerging and enduring challenges facing local governments.**

| Strategy Number | Strategies                                                                                                                             | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| E.1             | Continue to support and highlight academic and practitioner research identifying the most significant issues facing local governments. | <ul style="list-style-type: none"><li>• Conduct national surveys on local government policies and programs associated with such key topics as economic and community development/planning, sustainability, public health, and disaster recovery, and produce thought leadership pieces on the survey results and leading practice case study communities.</li><li>• Produce public policy thought leadership pieces on disruptive technologies, social changes, and other challenges impacting local government management.</li><li>• Recruit and manage Local Government Research Fellows from academia and practitioner backgrounds to implement research projects.</li><li>• Conduct research and produce various content outputs on the first 50 years of African-American city and county managers.</li><li>• Continue blog post series highlighting research that connects with issues facing local government.</li><li>• Continue quarterly newsletter to academics highlighting the most recent ICMA research.</li></ul> |



| Strategy Number | Strategies                                                                                                                                | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| E.2             | Partner with the other Big 7 and other related organizations to collectively respond to public policy issues impacting local governments. | <ul style="list-style-type: none"> <li>• Provide information, resources, and content on legislation, regulatory actions, court decisions, referenda, and ballot box initiatives that may impact local government leadership and management.</li> <li>• Continue managing ICMA's relationship with the Big 7 and other peer organizations on public policy issues.</li> <li>• Officially launch <i>Public Policy Matters</i> e-newsletter and make it available for subscription to members and nonmembers.</li> </ul> |

## STRATEGIC INITIATIVE F:

## Be the principal resource for leadership and management in local government.

| Strategy Number | Strategies                                                                                                                    | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F.1             | Design and deliver programming to address the important trends, drivers, and issues affecting local government professionals. | <ul style="list-style-type: none"> <li>• Continue to manage the U.S. Department of Energy funded SolSmart program for designating communities as "solar ready" for their work in streamlining local policies for solar projects.</li> <li>• Provide information, resources, and content on policy disrupters including new technologies, societal issues, policy preemptions, ballot box, and other referenda.</li> <li>• Continue to partner with New York University to deliver information about the new City Health Dashboard tool and resources for local governments.</li> <li>• Establish a financially sustainable line of products and services designed to help local governments implement innovative solutions.</li> <li>• Work with the Leadership Advisory Board to develop a 3-year plan for the continued expansion of ICMA online certificate programs, providing a clear path from the fundamentals to state-of-the-practice and state-of-the-art.</li> </ul> |

| Strategy Number | Strategies                                                                                                             | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------|------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F.2             | Assess, develop and promote professional management competencies and disciplines.                                      | <ul style="list-style-type: none"> <li>Promote the revised Applied Knowledge Assessment to reflect the revised ICMA Practices for Effective Local Government Leadership and the associated management dimensions.</li> <li>Promote the new leadership assessment that measures knowledge of the new leadership dimensions of the ICMA Practices for Effective Local Government Leadership.</li> <li>Continue to push out the Lead Now blog series content that connects with the ICMA Practices for Effective Local Government Leadership.</li> </ul> |
| F.3             | Incorporate the concept of leadership in professional development offerings.                                           | <ul style="list-style-type: none"> <li>Work with the Leadership Advisory Board to develop a formal communications plan for a broad membership review of the ICMA Practices for Effective Local Government Leadership.</li> </ul>                                                                                                                                                                                                                                                                                                                      |
| F.4             | Promote leading practices to ensure local government's ability to attract and retain a talented and diverse workforce. | <ul style="list-style-type: none"> <li>Produce book-length content on local government management and leadership; begin revising ICMA's seminal publications <i>Managing Local Government Services</i> and the <i>Effective Local Government Manager</i>.</li> </ul>                                                                                                                                                                                                                                                                                  |
| F.5             | Promote ICMA globally as the resource for leading practices in local government management.                            | <ul style="list-style-type: none"> <li>Cross-promote leading practices through global affiliates and ICMA channels; and leverage media partnerships.</li> <li>Capture and share best and leading practices and the impacts of ICMA's local government management programs around the world through the development of training curricula, case studies, tailored tools and methodologies, and participation in high-profile events and meetings with funders.</li> </ul>                                                                              |
| F.6             | Organize and deliver content so it is easily accessible and fresh.                                                     | <ul style="list-style-type: none"> <li>Identify channels and methods (video, podcast, article, newsletter, etc.) for how priority topics, hot topics, and other important information is shared most effectively.</li> <li>Through the well-planned search engine optimization strategy, deliver content on the icma.org topic pages specific to the priority content topics, to drive visitors to read, download, and follow ICMA's content.</li> </ul>                                                                                              |

**STRATEGIC INITIATIVE G:**

## Promote the value of professional management and ICMA membership.

| Strategy Number | Strategies                                                                                                   | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------------|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| G.1             | Focus prioritization on ethics, leadership, professional development, and member connection.                 | <ul style="list-style-type: none"><li>Using the content calendar as a tool, develop priority topic and product content derived from member-contributed content, so that members and prospective members see people like them on the front lines promoting the value of ICMA membership as topic and product ambassadors.</li><li>Continue to push out the Lead Now blog series content that connects with the ICMA Practices for Effective Local Government Leadership.</li></ul> |
| G.2             | Find new ways to articulate the value of ICMA membership.                                                    | <ul style="list-style-type: none"><li>Implement the “52 Reasons” campaign, composed of weekly posts from members on why they belong to ICMA.</li><li>“Humanize” member benefits and “put a face” on the benefits of being a member by creating videos of members that include clear value explanations and testimonies.</li></ul>                                                                                                                                                 |
| G.3             | Educate elected officials on the value of professional local government management.                          | <ul style="list-style-type: none"><li>Continue to enhance and promote the toolkit and other advocacy resources focusing on election cycles and orientation timing.</li></ul>                                                                                                                                                                                                                                                                                                      |
| G.4             | Expand programs in schools to explain local government and encourage careers in local government management. | <ul style="list-style-type: none"><li>Distribute the coloring book through affiliate programs and members.</li></ul>                                                                                                                                                                                                                                                                                                                                                              |
| G.5             | Educate the public on the council-manager form of government.                                                | <ul style="list-style-type: none"><li>Promote the Regions of Focus (where form of government is a high-profile issue) campaign using new video, case studies, and media blitz.</li></ul>                                                                                                                                                                                                                                                                                          |

| Strategy Number | Strategies                                                                            | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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| G.6             | Expand the outreach to community members presenting value of professional management. | <ul style="list-style-type: none"> <li>• Test digital video ads on YouTube and other digital channels to expand visibility of message.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| G.7             | Connect the profession's commitment to ethics to building public trust.               | <ul style="list-style-type: none"> <li>• Publish and promote a second e-book on ethics in the series focused on the ICMA Code of Ethics and building public trust, reaching members and others who are seeking more in-depth understanding of ethics.</li> <li>• Reach a greater number of members and nonmembers by continuing to offer ethics training to state associations and conducting an ethics orientation via teleconference for state association boards.</li> <li>• Develop an online training module on the ICMA Code of Ethics for members.</li> <li>• Create an ethics consortium with other associations to contribute to the dialogue on ethics and advance the discussion and commitment to ethical principles.</li> <li>• Promote positive ethical stories and practices by presenting an award to an organization with the best Code of Ethics.</li> </ul> |
| G.8             | Enhance the Job Center platform to support member career advancement.                 | <ul style="list-style-type: none"> <li>• Continue implementing technology improvements to the Job Center platform.</li> <li>• Continue to enhance Job Center capabilities and marketing.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## STRATEGIC INITIATIVE H:

## Reach members and other important stakeholders through expanded use of technology and emerging media.

| Strategy Number | Strategies                                                                                         | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| H.1             | Identify ways to support distance learning for members.                                            | <ul style="list-style-type: none"> <li>Continue to enhance the Virtual Conference on the new state-of-the-art platform and launch a refreshed marketing campaign.</li> <li>Continue distance learning offerings on the new learning management system (online programs platform), utilizing such advanced features as animations, polling, and handouts; monitor quality on an ongoing basis.</li> <li>Develop new courses to create additional learning tracks for LG 101, round out the offerings, and respond to emerging trends.</li> <li>Invest in new e-course authoring technology to allow for an expansion of our e-course offerings.</li> <li>Produce and launch new Ethics 201 e-course.</li> <li>Work with the Leadership Advisory Board to develop a three-year plan for continued expansion of the ICMA online certificate programs, providing a clear path from the fundamentals to state-of-the-practice and state-of-the-art.</li> </ul> |
| H.2             | Use new technology, digital/video media, and graphic design to engage members and deliver content. | <ul style="list-style-type: none"> <li>Continue to test and optimize digital templates and roll out the most effective elements as part of the content calendar.</li> <li>Continue implementing the ICMA Connect Network that provides easy access to member collaboration, networking, and content.</li> <li>Streamline, automate, and measure marketing tasks and workflows so that ICMA membership, products, and services can increase operational efficiency and grow revenue faster.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

| Strategy Number | Strategies                                                                                                | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                    |
|-----------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| H.3             | Continue to invest in developing a platform to share content and encourage peer learning and discussions. | <ul style="list-style-type: none"> <li>Promote engagement via the ICMA Connect Network ambassadors who can seed and facilitate discussion.</li> </ul>                                                                                                                                                                                  |
| H.4             | Identify business partners to help leverage technology and media capability.                              | <ul style="list-style-type: none"> <li>Begin performing a comprehensive analysis of the current Strategic Partner program and its benefits, as well as all of ICMA's assets and products and services.</li> <li>Evaluate the needs of ICMA members and the benefits the Strategic Partners can provide to meet those needs.</li> </ul> |
| H.5             | Expand the way ICMA delivers its message and content.                                                     | <ul style="list-style-type: none"> <li>Continue to roll out the digital PM experience and build on strong member content contributions.</li> <li>Continue the rollout of the ICMA Connect Network, content syndication, video, story maps, and enhancements to our social media presence.</li> </ul>                                   |



## STRATEGIC INITIATIVE I:

## Support the continued growth and development of ICMA's business enterprises and operational resources.

| Strategy Number | Strategies                                                                                                  | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------|-------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| I.1             | Maintain strong financial and operational policies and practices to ensure the vitality of the Association. | <ul style="list-style-type: none"><li>• Continue to transform ICMA and position it as a best-in-class organization that is forward-looking, agile, and entrepreneurial.</li><li>• Implement the most effective and financially advantageous strategy related to ICMA's physical office footprint.</li><li>• Continue to improve and streamline organizational processes to ensure efficient operations.</li><li>• Continue strengthening internal control over resources and financial reporting.</li><li>• Continue to review and modernize ICMA's policies and procedures to ensure compliance with the law and applicable regulations.</li><li>• Improve administration of funded awards by implementing a project management solution to track scope, budget, and schedule for individual projects.</li><li>• Implement a streamlined budgeting and forecasting solution to ensure effective financial planning and management.</li><li>• Continue implementation and ensure effective use of Corporater, ICMA's new performance management, business intelligence, and reporting system.</li><li>• Maintain clean membership and prospect data by utilizing netFORUM effectively.</li><li>• Maintain an optimal information technology infrastructure and effective and efficient network support.</li><li>• Continue implementing security innovations, such as two-factor authentication, laptop encryption, and remote wipe software.</li></ul> |

| Strategy Number | Strategies                                                                                                            | FY 2020 initiatives                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------|-----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| I.2             | Develop strategies to attract and retain outstanding and diverse staff for ICMA.                                      | <ul style="list-style-type: none"> <li>• Build ICMA's "employer brand."</li> <li>• Develop a compelling employee value proposition and 360 employee experience.</li> <li>• Streamline recruitment, hiring, and onboarding processes.</li> <li>• Align organizational structure and culture to position ICMA for the future.</li> <li>• Attract new talent, grow and develop existing talent, and maintain a future-ready workforce.</li> <li>• Utilize a strategic approach to talent and skill development and focus on capabilities.</li> </ul>                                                                                                                                                                                                                                                                |
| I.3             | Support a range of viable business lines to diversify the Association's revenue stream.                               | <ul style="list-style-type: none"> <li>• Continue to seek opportunities to enhance ICMA's revenue streams.</li> <li>• Ensure financial viability of ICMA's products and services, such as the local government innovation initiatives.</li> <li>• Begin evaluating ICMA's Strategic Partner program as well as other ICMA assets and services to effectively market corporate sponsorship opportunities.</li> <li>• Continue to produce prime and subcontracting proposals for federal agencies, foundations, and other donors in support of ICMA's funded technical assistance, as well as such new initiatives as the Urban Mobility Forum.</li> <li>• Create common metrics across the GPM portfolio to demonstrate quality of technical assistance and capture new business from diverse clients.</li> </ul> |
| I.4             | Periodically review the dues policy to ensure that ICMA can attract, retain, and grow membership.                     | <ul style="list-style-type: none"> <li>• Review and develop a new dues structure presentation for the ICMA Executive Board.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| I.5             | Maintain the strong relationship with ICMA-RC to support ICMA's members and their role in building great communities. | <ul style="list-style-type: none"> <li>• Continue to work with ICMA-RC on enhancing visibility of its products and services through joint marketing efforts.</li> <li>• Finalize agreement on the fair market royalty rate for the use of ICMA's name and brand, based on the independent valuation study.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |



**STRATEGIC INITIATIVE J:**

## Evaluate the governance of the Association to enhance alignment with ICMA's strategic goals and core beliefs.

| Strategy Number | Strategies                                                                                                                                                             | FY 2020 initiatives                                                                                                                                                                                                               |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| J.1             | Expand efforts to inform members about the role of the Executive Board and its election process.                                                                       | <ul style="list-style-type: none"> <li>Improve the website and create a FAQ to more clearly articulate the role and value of serving on the board.</li> </ul>                                                                     |
| J.2             | Evaluate the Executive Board selection process, including regional protocols and geographic assignment of states so that it aligns with ICMA's Core Beliefs and goals. | <ul style="list-style-type: none"> <li>Develop ballot initiatives to implement board-approved recommendations on voting and board service.</li> <li>If approved by members in FY 2020, implement the revised approach.</li> </ul> |
| J.3             | Review voting eligibility so that it is consistent with the core beliefs and goals of the Association                                                                  | <ul style="list-style-type: none"> <li>Develop ballot initiatives to implement board-approved recommendations on voting and board service.</li> <li>If approved by members in FY 2020, implement the revised approach.</li> </ul> |



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