



Vision and Mission Statements

Vision Statement:

The North Carolina Local Government Budget Association will be a premier local government professional association, by advocating for innovation, strategic visioning, stewardship, and integrity to improve communities across North Carolina.

Mission Statement:

The North Carolina Local Government Budget Association advances strategy, budget, and performance management through advocacy, continuous learning, a diverse membership, networking, and collaborative partnerships.

Core Values

*Innovate for **results**
Drive and **embrace** change
Lead with **strategic** vision
Purse learning and growth
Collaborate with **inclusivity**
Act through **stewardship**
Serve with **passion** and integrity*

NCLGBA Three Year Goal Statements

Goal 1: Increase membership participation to be more sustainable and diverse

Key Questions:

- Is the goal to drive up the number of members in a single year or to sustain a certain level of members?
- Who are our members?
- What does diversity mean?
 - Directors, Manager, and Budget analysts
 - City/county managers
 - North Carolina Government Finance Officers Association (NCGFOA)
- Can we leverage work of others – cross pollinate?
- Can we make greater efforts to involve budget directors, assistant city/county managers, past presidents, and city/county managers?

Key Objective:

- To understand our membership base (demographics, rural/urban, population)

Performance Measure linked to Goal 1:

- Short Term: **10% membership increase in year one and 5% increase in years two and three** beginning from the 248 members that we ended 2017-2018
 - August 31, 2018: **248** (start)
 - August 31, 2019: **273** (Year 1) – 10% increase
 - August 31, 2020: **287** (Year 2) – 5% increase
 - August 31, 2021: **301** (Year 3) – 5 % increase
- Long Term: Sustain a constant level of membership
 - Goal: 300 members annually

Goal 2: Increase Partnership opportunities with external groups to improve the content offered to our members

Key Questions:

- Who are our prospective partners?
 - NCGFOA, North Carolina City and County Management Association (NCCCMA), Engaging Local Government Leaders (ELGL), North Carolina League of Municipalities (NCLM), North Carolina Association of County Commissioners (NCACC), current and future sponsors
 - Emphasis placed on partnerships with local and North Carolina based organizations

Key Objectives:

- To partner with local/state-wide groups offering content corresponding with our vision and mission but not necessarily in the NCLGBA wheelhouse adding value to our conferences and appealing to members of our association.
- Offer members and students opportunities to learn and develop budget skills through webinars/seminars/regional meetings in addition to the training opportunities offered through NCLGBA conferences.

Performance Measure linked to Goal 2:

- Initiate, coordinate, and hold **three** joint meetings/seminars/webinars with external groups by end of 2019-2020 fiscal year
 - ELGL national conference coming to Durham in fall of 2018
 - Partner with NCLM/NCACC on revenue, sales tax, or legislative update webinars each year; extend webinar opportunities to students and members alike
 - Look for opportunities to partner and communicate with NCGFOA/NCCCMA

Goal 3: Increase student interest and participation within NCLGBA in order to advocate for the budgeting profession and to help create and foster the next generation of local government leaders

Key Questions:

- Is the goal to increase the number of students reached or increase the number of student members of the organization?
- Are students generally aware of NCLGBA?

Key Objectives:

- Advocate for the profession at the university graduate school level

- Scholarships: look at parameters of program
- MPA programs and those in the non-profit track
- Work with jurisdictions to send interns
- Increase the level of interest in the budget profession and to prepare the next generation of public sector budgeteers
- Mentor, inspire, advocate, educate

Performance Measure linked to Goal 3:

- Present to three MPA programs or student associations annually
 - Divide schools and NCLGBA members geographically (could include past presidents or interested non-board members)
 - **Survey participants** about their interest or engagement in the NCLGBA and the profession
 - **Increase the number of student applicants** for the scholarship program in order to average **eight applications** per conference
 - **Average two scholarships** per conference over the next three years

Goal 4: Review and formalize the Certified Budget and Evaluation Officer Certification process

Key Questions:

- Who values the certificate?
- Who maintains certification records?
- What does long term success look like for this program?
- What's next? We now have a critical mass of certified budget officers.

Key Objectives:

- During FY2018-2019 and FY2019-2020, review the program by surveying NCLGBA membership (both CBEO and non-CBEOs) asking what is working well and seeking opportunities for improvement. Develop potential changes and present findings to the NCLGBA board and membership to ensure the program is meaningful to those who earned the certificate.

Performance Measure linked to Goal 4:

- NCLGBA President assigns a subcommittee to review the program as it enters its tenth year of existence
- CBEO subcommittee to be comprised of representative of UNC School of Government, 2 at-large board members, 2 CBEO (already achieved certification) non-board members, and current President
- Subcommittee will review the CBEO program and suggest any needed changes; in addition, it will design a process to ensure CPE forms are managed and filed correctly
- By end of 2019-2020, report out to full membership at Summer Conference on any proposed changes to the certification process

Goal 5: Create a sustainable, consistent list of reliable sponsors that add value to the organization, its members, and are fully engaged with the NCLGBA's vision and mission

Key Questions:

- Is it more important to have a consistent list of sponsors or to increase sponsors for a particular conference, or both? Is it possible to do both?

- Is there is a difference between the number of sponsors and the amount of sponsorship dollars brought into the conference?
- Is it more sustainable to create a larger network of sponsors so the association isn't left with relying on large one sponsor?
- Is it more important to increase the number of sponsors or increase the number of dollars?

Key Objectives:

- To maintain and increase the number of annual sponsors
- It is to our advantage to concentrate on consistent, long term sponsors because it helps to increase the quality of content, offer more scholarships and enhance the networking opportunities in the conference
- "Long term" sponsors are those that are willing to partner with the NCLGBA for more than one year – meaning they see value in partnering for more than two conferences

Performance Measures linked to Goal 5:

- **Average of eight long term sponsors** by 2020 and **twelve** by 2022
 - Increase the diversity of sponsorships – wider range of companies or vendors