Our Bridge to the Future

Strategic Five-Year Plan

Treasurers’ Association of Virginia

2008
Our Bridge to the Future
Strategic Five-Year Plan

Special Acknowledgements:

Futures Committee
Ellen Booker Kirby, Chair
Richard A. Cordle
William S. Kirby

Membership of the Treasurers’ Association of Virginia

Minuteman Press

Treasurers’ Association of Virginia
2008
TREASURERS' ASSOCIATION OF VIRGINIA

2007-2008 OFFICERS

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<tr>
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<tr>
<td>President</td>
<td>C. R. Suddith, Jr.</td>
<td>Page County</td>
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<tr>
<td>President Elect</td>
<td>Tara L. Thomas</td>
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<td>1st Vice President</td>
<td>Gerald W. Duncan</td>
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<td>2nd Vice President</td>
<td>W. Ann Davis</td>
<td>James City County/Williamsburg</td>
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<tr>
<td>Treasurer</td>
<td>Barbara O. Carraway</td>
<td>City of Chesapeake</td>
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<tr>
<td>Secretary</td>
<td>Elizabeth A. Ledgerton</td>
<td>Fauquier County</td>
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2007-08 FUTURES COMMITTEE

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<tr>
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<tr>
<td>Ellen Booker Kirby, Chair</td>
<td>Northumberland County</td>
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<td>Jennifer Brown</td>
<td>City of Charlottesville</td>
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<td>Richard A. Cordle</td>
<td>Chesterfield County</td>
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<td>Marty G. Eubank</td>
<td>City of Newport News</td>
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<td>Kevin Hutchins</td>
<td>Roanoke County</td>
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<td>William E. Jones</td>
<td>Dinwiddie County</td>
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<tr>
<td>Stephen L. Moloney</td>
<td>City of Fairfax</td>
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<tr>
<td>Al Spengler</td>
<td>Weldon Cooper Center, University of Virginia</td>
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<td>C.R. Suddith</td>
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<td>Harry Whitt</td>
<td>King William County</td>
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<td>Donald Wood</td>
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<td>Phyllis M. Yancey</td>
<td>Orange County</td>
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<tr>
<td>Fields R. Young, Jr.</td>
<td>Grayson County</td>
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<tr>
<td>William S. Kirby</td>
<td>Facilitator</td>
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The only way to predict the future is to have the power to shape it.
— Eric Hofer
"Let every man praise the bridge that carries him over"

---English Proverb
OUR BRIDGE TO THE FUTURE

Strategic Five Year Plan

INTRODUCTION

We can't cross that bridge until we come to it, but I always like to lay down a pontoon ahead of time.

------Bernard Baruch

The Futures Committee was formed in 1994 to provide the Association a means of establishing a proactive approach toward a host of issues facing us. We were facing a changing political climate, increasing pressures on local government to re-examine methods and procedures for doing business, and concern about the future of constitutional officers. Fourteen years have passed but the environment continues to pose challenges to our operations. Taking a proactive approach to issues allows us to become active participants in our future rather than react to what is happening to, and around us.
The purpose of the Futures Committee is to 1) identify and examine issues affecting treasurers, taking into account internal and external, present and potential factors and 2) make recommendations for solutions to the leaders and membership of the Association. These recommendations identify the problem or need, set goals, suggest means to accomplish the goals, and set forth an action plan. Periodically since 1994, the Futures Committee has identified goals for achieving our vision and mission and developed strategic plans so that TAV can better focus its work and upgrade its performance. The Futures Committee met at the end of February 2008 for a two-day retreat. The committee reviewed previous Futures Reports with an emphasis on the accomplishments and continued viability of the goals and strategic targets of the 2002 report. We surveyed the membership (both treasurers and deputies) through the TAV forum in March. Strategic goals were developed by the Futures Committee in February and presented to the treasurers at the four District meetings in April. The presentations generated discussion, and many ideas were suggested. The comments reinforced the discussion and work of the Futures Committee.

In May, the Futures Committee proposed to the Treasurers’ Association Board of Directors that the Association adopt these four strategic goals to become the focus of our strategic plan for the next 5 years:

- Improving Member Education
- Building Professional Standards and Best Practices
- Achieving More Reliable Funding Sources
- Strengthening External Relationships

This plan was passed by the TAV membership at the annual meeting in July 2008.

The Futures Committee would like to thank Bill Kirby for his hard work and expertise in facilitation and preparation of this report.

HOW FAR WE’VE COME!

Discipline is the bridge between goals and accomplishments.  

—Jim Rohn

The first Futures Report in 1995 included recommendations in the areas of Technology, Education, Customer Service, Standards of Excellence, Legislative Approaches, and Public Relations and became the blueprint by which the Association operated for the next seven years.
There is no question that in the last decade and a half we have made huge strides in technological and educational advancement! In 1995, one goal was to have a minimum of one PC per Treasurer’s Office. How far we have come!!! Other goals such as the development of an Association website, establishment of new officer training, and the creation of a treasurers’ accreditation program are in place and commonly accepted standards.

In fact, in the seven years following the adoption of the 1995 Strategic Plan, the Treasurers’ Association achieved almost all of the goals set forth. The goals were attained because of the dedication and commitment of the Association leadership and membership.

Through the implementation of those goals, treasurers were utilizing the technology available to them to provide more convenient, efficient, and faster service to the citizens. The use of brochures and other materials raised the public awareness of the services offered by Treasurers’ Offices.

Participation in the new certification program elevated the professionalism of the treasurers and their staff. The Association successfully replaced its previous certification program with a more comprehensive program that includes required core courses and testing to qualify for certification. This certification program has received national recognition and has been adopted by national associations for their own use. The program takes approximately three years to complete. By 1998, sixty-six treasurers and thirty-one deputies had received Level II certification. Currently, 83 treasurers and 223 deputies are certified at Level II.

The Level II certification for treasurers also became part of another nationally recognized program, the Career Development Program sponsored by the State Compensation Board. As of 2008, 70 current treasurers and 190 deputies have met the CDP requirements.

The Association and its members gained strength politically, which allowed for a greater voice in legislation affecting our offices. For example, treasurers were asked by state officials to participate in the development of procedures for the Personal Property Tax Relief Program.

The 1995 Strategic Plan concluded that excellence in customer service and accountability to the citizens who elected us are the two most important issues; this continues to hold true today. The Association, treasurers and their staff dedicated themselves to achieving the goals of the 1995 Strategic Plan and these achievements have had a very positive impact on the service to the citizens of the Commonwealth. Our ability to provide exceptional public service is the measure of our success. Truly, we are only successful when we provide that exceptional service to our citizens.
ACCOMPLISHMENTS OF THE 2002 STRATEGIC PLAN

"The greater danger for most of us lies not in setting our aim too high and falling short; but in setting our aim too low, and achieving our mark."

--- Michelangelo Buonarroti

Between 1995 and 2002, there had been a forty percent turnover in treasurers. The goals of the 1995 Strategic Plan had been accomplished. The Futures Committee repeated the strategic planning process, involving the membership in identifying the issues facing treasurers and soliciting creative ideas and suggestions to continue to excel. Vision and Mission Statements were developed for the Association, and strategic target areas were identified. These target areas were: Service, Education, Communication and Networking, Lobbying and Funding, and Public Relations and Perception. Although technology remained a very important focus, it was not addressed separately because technology impacts all the target areas.

The treasurers have always been committed to excellence in service. The Treasurers’ Association motto, Elected to Serve, evokes the highest standards of professionalism and leadership to serve the needs of the people. Qualities such as integrity, teamwork, communication, and accountability are cornerstones.

Over the past years we have realized many successes. Yet there is always room for improvement. Our strategic plans have been a culmination of past experience, present commitment, and future vision to help guide us over the bridge from past to future. As public servants, we want to leave a positive and lasting vision of governmental service.
and we are committed to providing exemplary customer service. The following is from the 1995 Futures Report.

**COMMITMENTS OF VIRGINIA'S TREASURERS**

We are committed to the delivery of the best possible service through technology and continuing education and by promoting competency and professionalism through our offices.

We will be creative and maintain an environment which encourages and regards innovation and makes the best use of our talents and abilities.

We will deliver service to our citizens in a timely and appropriate manner through open lines of communication, dignity, honesty, and accountability.

We are committed to maintaining, at all times, the public trust placed in us as elected public officials.

We continue to be committed to these values. In the 2002 Futures Report, the commitments were presented as the mission of the Treasurers’ Association of Virginia: to enhance professionalism and fiscal leadership among treasurers and their staff through education, networking, and performance standards in order to provide citizens with responsive and responsible government.

Our vision is the transformation of treasurer from tax collector to a recognized public finance professional. We strive to be educated and informed in all areas of local financial management and related fields. We strive to raise our level of credibility with local and state governing bodies and strengthen our ability to deliver high quality service.

Our members will be equipped with the educational, networking, and technological tools to achieve “best practices” within our offices. We will create an environment of inclusion, cooperation, and involvement where ideas and information flow freely.

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There is no more powerful engine driving an organization toward excellence and long-range success than an attractive, worthwhile, achievable vision for the future, widely shared.

— Burt Nanus, Visionary Leadership

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THE BRIDGE AS METAPHOR

As the Futures Committee looked at the results of TAV members’ input on the review of the strategic plan, a theme began to develop. In the 2002 Strategic Plan, a nautical theme ran throughout the report. This year, we keep coming back to the idea of a bridge. The idea of overcoming insuperable divides of time or reality forms the conventional essence of the bridge as metaphor symbolizing transition or passage.

A bridge can be defined as “that which spans or provides passage over a chasm or gap; a transitional route between two points.” The bridge below represents our crossing from past experiences and where we are at present to the future.

We needed an action plan to span the gap from the successes of our past to those of the future. In each of the years depicted at the left of the diagram, we developed a strategic plan for the Association. The years in which we made the most progress as an association were the years we used the Futures Reports as a road map to guide the actions of the Association.
The broad goals of our strategic plan focus on the following strategic target areas:

I. IMPROVING MEMBER EDUCATION

II. BUILDING PROFESSIONAL STANDARDS AND BEST PRACTICES

III. ACHIEVING MORE RELIABLE FUNDING SOURCES

IV. STRENGTHENING EXTERNAL RELATIONSHIPS

V. THE GOALS AND HOW TO ACCOMPLISH THEM: GOVERNANCE

The diagram depicts these major areas. Relationships are the foothold for where we want to go, for without each other, there is no progress. We cannot succeed, because there is no where to go…..there is no reason to even have a bridge.

The mainstays of the structure and of our efforts are the standards we use—those best practices that we measure ourselves against—and the funding that allows us to do those things we need to do to operationally accomplish the tasks at hand.

Education is overarching and continues across the span, for we never stop learning and growing from that knowledge. It connects the span from past to future.

Governance, the internal workings of the Association, is the structure that provides the foundation of the entire organization. It must be strong in order to support the other parts and functions of the bridge. A strong TAV leadership, like the foundation of the bridge, supports the members, promotes effective communication, organizational efficiency, etc.

There is an English proverb: “Let every man praise the bridge that carries him over.” In that, we see the idea of being thankful—not just for the past places we have seen and been—but also for the future ones where the bridge will carry us. Let us cross it together!

---Bernie Taupin, Lyrics; Elton John, Music: The Bridge

I. IMPROVING MEMBER EDUCATION
Member Education is the lynchpin of the Treasurers’ Association. It is at the center of all of our programs and activities; and upon its quality all of our future success depends. The development of the Certification Program has propelled us to higher levels of professional and career development. But education is a lifelong journey, not a destination that ends with another level of certification. Continued leadership by TAV in education depends on looking at the environment in new ways, asking new questions and searching for new answers. This means not only building on our existing professional development programs, but pushing out into new types of education and education delivery, and broadening the body of knowledge necessary to thrive in an ever changing environment.

Education improves communication through enhanced understanding. Trained treasurers and staff equal better value and service to the public, better revenue collection and financial safekeeping, better ability to do more with fewer resources. Education is integral to elevating the treasurer from tax collector to a recognized public finance professional, directly accountable to the people.

There is no question that in the last 15 years we have made huge strides in educational advancement! We elevated the certification program to include core courses and testing for initial certification and continuing education for recertification. The following chart shows the success of the program:

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<th>YEAR</th>
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<th>Deputies</th>
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<td>0</td>
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</tr>
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<tr>
<td>2008</td>
<td>179</td>
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It is the desire that 100% of the membership attain certification. Full participation is the benchmark we use for success. The Treasurers’ Association of Virginia effectively set the
standard for public finance professionals and other organizations throughout the country have modeled their programs after ours.

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Learning is not compulsory; neither is survival.  

---- Peter Zwack

A. Continue and Enhance the Certification Program
We will continue to develop strategies to increase the participation of the membership in the certification program. A benchmark is to achieve 100% participation. It is our goal that all treasurers and staff members will expediently achieve the highest level of training and certification available.

1. **Review and Modify Certification Requirements and Standards**
   
   *(Responsibility: Education Oversight and Certification Review Committees)*

   The success of the certification program has brought the realization that the continuing requirement for retaking courses may not be the wisest use of our resources. Modeling our program after that of the Certified Public Accountants, for example, may give us greater flexibility while still maintaining and benefiting from our continuing education requirements.

2. **Examine the Feasibility of Developing a Higher-Level Certification Program**
   
   *(Responsibility: Education Oversight Committee)*

   The idea of a Level III certification has been discussed since the mid-1990’s. It might take the form of a national certification. The concept that we must continue to learn is imperative.

3. **Expand the Range of Course Offerings, as appropriate**
   
   *(Responsibility: Curriculum Committee)*

   We have developed a significant curriculum and by utilizing Virginia Government Finance Officers courses, TAV offers a wide range of classes in the financial and personnel management fields. There are other courses yet to be developed that can enhance the level of knowledge of treasurers and their staff.

4. **Explore Opportunities for Using Alternative Technology for Course Offerings**
   
   *(Responsibility: Curriculum and Innovations and Technologies Committees)*

   We will continue to pursue the latest technological media (teleconferencing,
Internet, DVD, videoconferencing) and the Community College System to increase regional offerings and to deliver the certification classes. We will continue to develop and innovatively deliver a comprehensive, world-class training and professional certification program to fulfill the vision and mission of the organization.

B. Work with Comp Board to Expand Officer and Deputy Training

*(Responsibility: Continuing Education and Compensation Board Committees)*

Understanding the limitations of state resources for funding, it continues to be our goal to expand the training to those already in office. Programs have been tailored to the number of incoming treasurers.

C. Develop an Appropriate Curriculum Covering Professional Ethics

*(Responsibility: Curriculum and Ethics Committees)*

The commitments of treasurers published in the first Futures Report in 1995 expressed the importance of maintaining the trust the public places in us as elected officials. We must be ever mindful of this honor and uphold the highest standards of conduct and accountability. We will pursue a formal ethics course for our Association.

D. Develop Follow-up Training for New Officers, Including Information on TAV Programs

*(Responsibility: Continuing Education Committee)*

Providing training to newly elected and appointed treasurers is a huge advance in recent years. The week-long training is an intensive inculcation and because of the quantity of information disseminated, difficult to absorb in a week’s time. Follow-up training and question-and-answer sessions can provide useful clarification and reinforcement.
II. BUILDING PROFESSIONAL STANDARDS AND BEST PRACTICES

Determine that the thing can and shall be done and then we shall find the way.

— Abraham Lincoln

Standards have been a hallmark of the Treasurers’ Association’s emphasis on promoting and recognizing professionalism and office effectiveness. The development of standards has undergirded Certification, Career Development, and Office Accreditation; and have helped lead to programs that have helped bolster the credibility of the Office of Treasurer both within government and with the public. However, the Association now faces increased public scrutiny and skepticism as a result of several highly publicized cases involving the misappropriation of funds by elected treasurers. These cases reflect negatively on the public’s perception of the integrity of our offices, and threaten the system of constitutional offices on which the concept of elected treasurers is based.

A second major emphasis should be on continuing to bolster the fairness, reliability, and credibility of the office accreditation program. Finally, systematizing and facilitating the identification and exchange of best practices information continues to be a major objective.

A. Develop a Comprehensive Strategy to Promote Professional Ethics Including Appropriate Training, Procedures, and a Public Relations Strategy

(Responsibility: Task Force of Chairs of Ethics, Education, Continuing Education, Curriculum Committees, President and President-Elect, and member of the Futures Committee)

The Futures Committee finds that developing and implementing a comprehensive strategy to address the issue of professional ethics needs to be one of the most important areas addressed by the Association in the next five years. This strategy will involve a range of efforts including education, procedures for responding to allegations of misconduct, possible professional sanctions resulting from fully adjudicated instances of misconduct, public relations, etc. The resulting efforts need to be fully integrated within the Certification, Career Development, and Office Accreditation programs; and may result in additional mechanisms that require formal action by or on behalf of the Association.
B. Continue and Enhance Office Accreditation

*(Responsibility: Accreditation Committee)*

The purpose of Office Accreditation is to improve service in individual offices and statewide. Accreditation is a type of quality assurance process under which a Treasurer’s Office is reviewed to determine if applicable standards are met and provide a means to measure of how well an office is performing essential functions. An annual checklist is maintained by the Accreditation Committee. Standards include generally quantifiable requirements such as collection rates, written policies and procedures, adherence to education and training requirements, and service delivery.

Currently there are 62 Treasurer’s Offices accredited. It is the goal that every office can achieve accreditation. The Accreditation Committee is in the process of reviewing the standards.

C. Improve the “Best Practices” Exchange System

*(Responsibility: Chair of the Innovations and Technology Committee, member of Futures, Education Committees)*

We will continue to develop and implement a comprehensive strategy to promote standardization and best practices among Treasurers’ Offices and to develop a best practices exchange system to enable localities to implement innovations. Standardization of practices increases uniformity across the state and benefits the citizens moving from one locality to another, and provides a standard basis for comparison among localities.

D. Enhance TAV Website as a Mechanism for Improving Information Sharing and Data Access

*(Responsibility: Chair of the Innovations and Technology Committee, member of Futures, Education Committees)*

The TAV web-site has been up and running for over ten years! It allows for the exchange of information and resources. There is a Q & A bulletin board which will be enhanced to allow for a search mechanism. Future ideas include a chat room, FAQ, help desk, and a TAV suggestion board. There are unlimited enhancements, many suggested and listed in the 2002 Futures Report.
III. ACHIEVING MORE RELIABLE FUNDING SOURCES

Your problem is to bridge the gap which exists between where you are now and the goal you intend to reach.

---- Earl Nightingale

In many localities there is a yawning gap between the resources necessary to carry out constitutionally mandated responsibilities of the treasurer, and the resources provided by the state and local authorities for doing so. This gap is exacerbated by the tension that exists between local taxing authorities, who think that state mandated positions and services should be paid for by the State; and constitutional officers, who believe that their primary responsibilities are for customers at the local level. The goal of the Treasurers’ Association is to help treasurers bridge this gap by increasing awareness among all parties about the role and value of the Office of Treasurer; and by cultivating additional income sources that are independent of the local and state budget process.

We envision a targeted effort to plan and oversee the development of necessary funding, including innovative sources that are reliable for the operation of our offices and Association with a continued emphasis on political outreach and education in both the general assembly and administration. This includes a strategic and systematic plan to raise awareness among our political leaders, state and local officials, fellow constitutional officers, and the public we serve about the role and value of the Office of Treasurer in local fiscal management.

A constant, permanent funding source and equitable funding mechanism is needed in order to provide sound financial management and cost effective, quality customer service to the taxpayers of the Commonwealth of Virginia. Sufficient funding will ensure recruitment and retention of good employees and state-of-the-art technology to provide a higher level of service to the public.
A. Establish TAV Task Force to Develop Recommendations for Establishing Alternative Funding Sources

(Responsibility: Sub-Committee of the Legislative Committee to be appointed by Legislative Chair)

This task force will investigate alternatives for establishing a permanent funding source for treasurers. Possible areas for consideration as funding sources include:

- State and local incentive funding
- Generation of more revenue from additional state income collections
- Charging for fees and services authorized by the state and earmarked for the Treasurers’ Offices
- Administrative fees for processing liens, distress warrants, bad checks, etc. for use by Treasurer’s Office
- Restructuring of current fees (administrative, parking, collection fees)
- Re-evaluation of current state fund distribution for possible change
- Creation of a state special fund
- Grants, donations
- Acceptance of increased responsibilities for additional funding, such as semi-annual billing and pro-ration that increases local revenue
- Lobbying for state requirements that increase the minimum funding standards for our offices placed on localities

B. Develop a Strategy to Achieve Compensation Parity with Market at The State and Local Level

(Responsibility: Compensation Board Committee)

Employees in the Treasurers’ Officers have a great deal of responsibility and are not merely cashiers, but often times senior accounting clerks. For example, a bookkeeper of the locality has enormous responsibility and should receive compensation commensurate with that responsibility.

Several larger localities have hired consultants to write job descriptions and evaluate pay classifications and this may be useful in getting compensation parity for our employees. It is our aim that our employees will receive more competitive pay.
C. Continue to Work to Identify Opportunities to Assume Fee-Based Functions

(Responsibility: Sub-Committee of the Legislative and Innovations and Technologies Committee and two at-large members knowledgeable about and active in this pursuit)

The concept is that Treasurers’ Offices can expand their service portfolio and provide additional state functions in a local customer service oriented environment. The Association has been successful in working with several state agencies, DMV in particular, to bring state services to the local level. Currently eleven Treasurers’ Offices are serving as DMV Select locations. During public hearings at the General Assembly this past session, legislators exhibited an interest in the local offices performing state work.

D. Evaluate Workload Measures as Needed to Ensure the Relationship between Workload and FTE Requirements is Accurate

(Responsibility: Compensation Board Committee)

Collection of workload measures has been revisited. The three year effect of the new methodology will be seen in FY2009. This must be an ongoing process in order to account for changes in PPTR, dog licenses, vehicle registration fees, etc.
IV. STRENGTHENING EXTERNAL RELATIONSHIPS

When we stand together
It’s our finest hour
We can do anything, anything
Keep believing in the power

---Naomi and Wynonna Judd
From “Love Can Build a Bridge”

Treasurers operate in a complex and interdependent governmental system. No single treasurer is able to manage this system on his own. Success at the individual level depends on working relationships with other treasurers, other constitutional officers, local and state elected and appointed officials, taxpayers, and other community interests. Success for treasurers as a community depends on forging strategic relationships at multiple levels, as well. The goal of the Treasurers’ Association is to forge and cultivate those strategic partnerships with state and local officials and other community interests that will serve to strengthen the overall interests of treasurers as a profession; and to assist individual treasurers with the information and skills needed to develop and strengthen the personal and local relationships needed to be successful professionally.

The Treasurer’s Office is close to the citizens at the local level and can provide the best in customer service. We are easily accessible to the public and directly accountable to the people and can serve as their liaison to government. We understand the responsibility entrusted to us and take that responsibility seriously.

The Treasurer’s Office can serve as the central point for state and local services and revenue collection providing a full service environment for the citizens of the locality. This can be done in a cost-effective manner and will lead to a more cohesive, effective, cooperative governmental environment. Partnerships with other associations, agencies, banks, businesses, and organizations strengthen the community as a whole.

Treasurers can be the catalyst for promoting a positive perception of government---combined services, shorter lines and advanced technology. Processes must be fully automated and integrated to operate in an environment of the increasingly check-less society where more and more business is conducted by e-mail and over the Internet. We can accomplish this by maintaining a high level of professionalism with a highly trained, motivated staff.
A. Develop a Comprehensive Strategy for Re-Invigorating Key Legislative and State Agency Relationships

(Responsibility: Education Oversight, Public Relations and Legislative Committees)

As elected officials, treasurers must operate effectively within the political arena. Proactive partnerships with our legislators and a strong, united message raise awareness about the role and value of the Office of Treasurer. Our lobbying efforts can impact legislative changes to improve work processes and enhance services.

The Association’s legislative agenda is one that jointly must be developed by, and clearly communicated to our membership, resulting in a unified initiative. Strong relationships with our legislators position us to obtain proper staffing, secure new sources of reliable funding for our offices, and participate in crafting tax legislation. Legislators have looked to the treasurers as a valuable resource in matters of fiscal management and we must continue to serve as a resource for them. The goal is that treasurers will be recognized as Public Finance Professionals and compensated as such.

B. Continue to Improve Interaction with Commissioners and Other Constitutional Officers

(Responsibility: Curriculum and Public Relations Committees)

Continuing to build strong interactive relationships with other constitutional offices and their associations will enhance local customer service and one-stop shopping for citizens. The Treasurers and Commissioners of the Revenue have participated in cross-training on roles and responsibilities as a means to promote understanding of each other’s offices.

C. Develop Models and Materials for More Effective Communication with Local Officials and Associations

(Responsibility: Curriculum and Public Relations Committees)

VALECO produced a brochure for the use of all constitutional officers. This brochure is now out of print and had limited success. A joint effort by the Commissions and Treasurers resulted in “Count on Us Virginia” brochures and bumper stickers to promote both associations and raise visibility of the two offices at the local level. Continued use of the “Count on Us Virginia” materials may be effective.
D. Develop Strategy to Have the Public View Treasurers as Knowledgeable Professionals

(Responsibility: Public Relations Committee)

Public relations are vital to ensure that the public understands the value of the Treasurer’s Office. As elected officials, directly accountable to the citizens, we must maintain their trust and confidence by providing outstanding customer service and sound financial management. We have made significant strides in educating citizens, including State and local officials, regarding the duties and responsibilities of the local treasurer. It is important, however, that we continue to take advantage of opportunities to inspire confidence and trust in the office and the officer.

The goal is that the treasurer will be recognized as a public finance professional who serves in a knowledgeable, professional, and responsive manner. By working in expanded roles and in partnership with others, we have become a valued resource in the financial management of our communities. We have raised our level of credibility with local and state governing bodies and are recognized for our ability to deliver innovative, quality service to the public.
V. THE GOALS AND HOW TO ACCOMPLISH THEM: GOVERNANCE

"Leadership is the capacity to translate vision into reality."

----Warren G. Bennis

The TAV leadership must embrace the vision and mission and implement the goals of the Association in order for us to move forward as an organization. The ongoing transformation of treasurer will require the mobilization of all of our talents, greater financial resources, and strong political support. In order to achieve our vision and carry out the TAV mission and goals, we will need to renew our efforts and create strategies to tap the energy and talents of all members. A role for every treasurer is vital for the success of this organization.

The achievement of our vision requires adherence to the plan, widespread participation by the membership, and commitment by TAV leaders. District chairs will be instrumental in carrying out our goals to unifying the members. We must be mindful of our mission and purpose.

A leadership retreat each August is recommended to give the officers, board members, committee and district chairs unified understanding of the year’s goals to implement this Strategic Plan. The Futures Committee strongly suggests that at the retreat in 2008 the Association committee and district structure be examined, re-defined and the results disseminated to the membership.

The action plans for each of the strategic targets intentionally have been left to the committees to develop, giving those members ownership and commitment to accomplishing the goals. The officers in planning committee assignments should consider continuity and overlap in order to maintain smooth transition. The active role that the district structure must play will be vital in engaging active participation in the membership.

The TAV Board of Directors will oversee the implementation of the overall Strategic Plan and members who are interested in participating in the action teams are invited to contact the appropriate committee chairs. The various committees charged with the responsibility of carrying out the action plans will report back to the TAV Board of Directors before the end of 2008 for approval of the implementation plans. Measurement of the accomplishment of the goals is vital to the success of our strategic plan.
The Futures Committee will periodically evaluate the strategic targets and make recommendations to the TAV Board if redirection is deemed necessary. The Futures Committee will evaluate the progress on the goals and present a report to the TAV Board of Directors and the membership at each annual conference.

The Futures Committee appreciates the involvement of the treasurers and deputies statewide in developing this strategic plan. All the ideas contributed by the membership throughout the process have been compiled and is available for use by the action teams to guide them in moving the Association forward (see Appendix A). Together we can make our vision reality!

Don't you think it's time?
Oh, don't you think it's time?

---Naomi and Wynonna Judd from “Love Can Build a Bridge”
CONCLUSION

In an organization of any significant size, the executives cannot create the future single-handedly. They must develop the enterprise in a constellation of teams within the overall team if they hope to bring the special talents and resources to bear on the challenge of creating superior customer value and sustaining a competitive advantage in the eyes of its customers.

— Karl Albrecht, The Northbound Train

Our success depends upon an informed membership. It is vital to have communication that is open, on time, and ongoing to foster the exchange of information and to provide each other with the assistance to achieve excellence. The more information we share, the greater is our efficiency and lobbying power. Communication and networking are essential to being recognized as public financial professionals.

Treasurers and staff should have immediate access to information and the ability and opportunity to exchange it freely. Communication has been facilitated by use of technology and the Internet, but in some cases it has been hindered. Opportunities for face-to-face interaction remain vital. More than ever, personal contact plays an important role in building relationships.

In order to be successful, the Treasurers’ Association must operate in an environment of inclusion and involvement where ideas and information flow fast, freely, and frequently. A role for every treasurer continues to be our goal. TAV must engage the energy and talents of all members, including deputies and town treasurers.

People with goals succeed because they know where they are going. The leadership of the Association has the tools to accomplish great things! We have a membership that is committed to achieving greatness! Armed with this five-year plan, joined together in action, we will cross the bridge and make our future reality!
APPENDIX A

TAV Member Comments and Suggestions
2008 Surveys and District Meeting Discussions

The best way to have a good idea is to have a lot of ideas. ——— Linus Pauling

Although the impetus for action rests on the leadership of the Association, it is the membership as a whole that determines the direction we must take. We are an Association of many talented, thoughtful individuals whose ideas and contributions are necessary for our success. The Futures Committee wanted to solicit comments from all the members—treasurers and deputies. A survey was distributed through the TAV forum in March. Strategic goals were developed by the Futures Committee and presented to the treasurers at the four district meetings in April. The presentations generated discussion, and many ideas were suggested. The comments reinforced the discussion and work of the Futures Committee and have been included this report. The comments and suggestions follow:

The members viewed the goals that we have accomplished over the past 14 years overwhelmingly to have been in the following areas:

- Education, Certification, CDP
- Technology—in offices, TAV Forum
- Lobbying Efforts, communication
- Website, increased communication
- DMV Select offices
- District Meetings, networking

Members thought the items that could and should be improved were issues involving:

- Funding, the need to get more involved w/legislators
- Lost role of District Chair (the personal touch in communication)
- The need to be proactive, not reactive
- Consistency and follow-through with our Big Brothers/Sisters program—some new treasurers did not feel welcome, though others sited this program as being very helpful
- Offering low cost education, on-line options, more accessible locations
The membership saw the issues facing the Association and treasurers in next five years to be:

- Lobby for more funding, set up think tank, get to legislators earlier
- Enhance the Forum, Treasurer’s Office websites
- Regional project sharing of software, equipment (form a servicing company, collaboration on systems, share costs)
- Keep state of the art (achieve the highest level of achievement using latest methods)
- Get more creative
- Technology
- Education, look at courses from other organizations, work with State Compensation Board
- Bring back the Statistical Abstract
- Promote state standard for Treasurers’ Offices through the General Assembly
- Get the message out about what we do
  - How to do a presentation
  - Reports of Accomplishments
  - Public Speaking
  - Brochures
  - Letters re: Accreditation, Certification to Local Governing Bodies

The members suggested the following to accomplish our goals:

- Don’t forget our core purpose
- Keep continuity in committees, work groups
- Have committees get more active & follow the strategic goals set forth in the Futures Report and annually report on their progress
- Look at Committee structures and responsibilities
- Learn from other organizations (GFOA, APT)
- Support Compensation Board
- Small Group Meetings
- Measurement of goals, accomplishment
- Disseminate information from meetings to those not able to attend
- ALL participate (“A Role for Every Treasurer”) and include town treasurers and deputies
APPENDIX B
2008 Strategic Goals—Committee Assignments

The only way to predict the future is to have the power to shape it.   — Eric Hofer

The Futures Committee assigned responsibilities to committees or action teams in order to carry out the strategic goals. The action plans for each of the strategic target areas have intentionally been left to those assigned to develop them, giving those members ownership and commitment to accomplishing the goals. The Futures Committee will assist and provide institutional knowledge as requested. Following are the specific committee assignments.

Education Oversight Committee

Review and modify certification requirements and standards (with Certification Review Committee)
Examine the feasibility of developing a higher-level certification program
Develop a comprehensive strategy for re-invigorating key legislative and State agency relationships (with Public Relations and Legislative Committees)
Improve the “best practices” exchange system (member of Education with Chair of the Innovations and Technology Committee, member of Futures Committee)
Enhance TAV website as a mechanism for improving information sharing and data access. (member of the Education Committee with Chair of the Innovations and Technology and a member of Futures Committees)
Develop a comprehensive strategy to promote professional ethics including appropriate training, procedures, and a public relations strategy. (Task Force of Chairs of Education, Ethics, Continuing Education, Curriculum Committees, President and President-Elect, and member of the Futures Committee)

Certification Review Committee

Review and modify certification requirements and standards (with Education Oversight Committee)
**Continuing Education Committee**

Develop follow-up training for new officers, including information on TAV Programs.

Work with Comp Board to expand Officer and Deputy Training (with Compensation Board Committee).

Develop a comprehensive strategy to promote professional ethics including appropriate training, procedures, and a public relations strategy. (Task Force of Chairs of Continuing Education, Ethics, Education, Curriculum Committees, President and President-Elect, and member of the Futures Committee)

**Curriculum Committee**

Expand the range of course offerings, as appropriate.

Explore opportunities for using alternative technology for course offerings (with Innovations and Technologies Committee).

Develop an appropriate curriculum covering professional ethics (with Ethics Committee).

Continue to improve interaction with Commissioners and other Constitutional Officers (with Public Relations Committee).

Develop models and materials for more effective communication with local officials and associations. (with Public Relations Committee).

Develop a comprehensive strategy to promote professional ethics including appropriate training, procedures, and a public relations strategy. (Task Force of Chairs of Curriculum, Ethics, Education, Continuing Education Committees, President and President-Elect, and member of the Futures Committee)

**Innovations and Technologies Committee**

Explore opportunities for using alternative technology for course offerings.

Improve the “best practices” exchange system (Chair of the Innovations and Technology Committee, member of Futures, Education Committees).

Enhance TAV website as a mechanism for improving information sharing and data access. (Chair of the Innovations and Technology Committee, member of Futures, Education Committees).

Continue to work to identify opportunities to assume fee-based functions. (Sub-Committee of the Innovations and Technologies and Legislative Committee and two at-large members knowledgeable about and active in this pursuit)
**Compensation Board Committee**

Work with Comp Board to expand Officer and Deputy Training (with Continuing Education Committee)
Evaluate workload measures as needed to ensure the relationship between workload and FTE requirements is accurate.
Develop a strategy to achieve compensation parity with market at the state and local level

**Legislative Committee**

Develop a comprehensive strategy for re-invigorating key legislative and State agency relationships. (with Education Oversight, Public Relations Committees)
Establish TAV Task Force to develop recommendations for establishing alternative funding sources. (Sub-Committee of the Legislative Committee to be appointed by Legislative Chair)
Continue to work to identify opportunities to assume fee-based functions. (Sub-Committee of the Legislative and Innovations and Technologies Committee and two at-large members knowledgeable about and active in this pursuit)

**Public Relations**

Develop a comprehensive strategy for re-invigorating key legislative and State agency relationships. (with Education Oversight, and Legislative Committees)
Continue to improve interaction with Commissioners and other Constitutional Officers (with Curriculum Committee)
Develop models and materials for more effective communication with local officials and associations. (with Curriculum Committee)
Develop strategy to have the public view treasurers as knowledgeable professionals

**Ethics Committee**

Develop an appropriate curriculum covering professional ethics (with Curriculum Committee)
Develop a comprehensive strategy to promote professional ethics including appropriate training, procedures, and a public relations strategy. (Task Force of Chairs of Ethics, Education, Continuing Education, Curriculum Committees, President and President-Elect, and member of the Futures Committee)
Accreditation Committee

Continue and enhance office accreditation

Futures Committee

Improve the “best practices” exchange system (member of the Futures Committee, Chair of the Innovations and Technology Committee, member Education Committee)

Enhance TAV website as a mechanism for improving information sharing and data access. (member of the Futures Committee, Chair of the Innovations and Technology Committee, member Education Committee)

Develop a comprehensive strategy to promote professional ethics including appropriate training, procedures, and a public relations strategy. (Task Force of Chairs of Ethics, Education, Continuing Ed, Curriculum Committees, President and President-Elect, and member of Futures)
**Photo Descriptions and Credits**

Cover Photo: Route 895 (Pocahontas Parkway) bridge over Interstate 95 and the James River, at sunset. The span links Chesterfield and Henrico counties. Photographer - Tom Saunders, VDOT

Title Page: Sinking Creek Sinking Creek Bridge (also known as Clover Hollow Bridge), a 70-foot span currently maintained by Giles County, was left in place for the property owner when a new bridge was built in 1949. It was built circa 1916 with modified Howe trusses. It is located just off Route 601 between Route 42 and Route 700, north of Route 460. (From VDOT)

Page 1: Natural Bridge, Rockbridge County. A National Historic Landmark and one of the Seven Natural Wonders of the World in Virginia's Shenandoah Valley. Surveyed by a young George Washington and once owned by Thomas Jefferson who described it as "the most sublime of nature's works." (From Virginia Tourism Corporation)

Page 4: Chesapeake Bay Bridge-Tunnel, crossing over and under open waters where the Chesapeake Bay meets the Atlantic Ocean, the Bridge-Tunnel provides a direct link between Southeastern Virginia and the Delmarva Peninsula. It is one of the Seven Engineering Wonders of the Modern World and was distinguished as "The Outstanding Civil Engineering Achievement" by the American Society of Civil Engineers in 1965. (From www.cbbt.com)

Page 6: Sketch by Ellen Kirby, inspiration by Richard Cordle, enhancement and scanning by Rocco Tricarico, A.I.A.

Page 9: The Wheeling Suspension Bridge spans the East channel of the Ohio River at Wheeling, West Virginia. It was the largest suspension bridge in the world from 1849 until the Queenston-Lewiston Bridge was opened in 1851. (From www.flickr.com)

Page 14: Built in 1917 over Opequon Creek, Wadesville in Clarke County (SR 672) A closed-spandrel barrel arch bridge, the date plate is installed in the concrete railing of the bridge—one of only a few pre-1924 bridges with date plates. (From www.vahighways.com)

Page 16: Built in 1904 over Claiborne Run near Fredericksburg on SR 607. This is a combo bridge over the creek and underpass under the railroad. The stream is at an extreme angle with respect to the road, such that each side of the tunnel has only one bridge railing. (From www.vahighways.com)

Page 19: Built in 1934 over Dunlap Creek, Callaghan in Alleghany County. Now SR 710, it was US 60 when built and may have been used until I-64 was built in the mid-late 1960s. There is one house on the other side of the bridge which is why it is still here! (From www.vahighways.com)
Page 21: Clarkton Bridge, spanning the 250 feet wide Staunton River connecting the counties of Halifax and Charlotte, was built in 1902. It is a magnificent through-truss bridge with a long entrance ramp on the Charlotte County entrance. The entrance on the Halifax County side is on a winding road along a cliff. The total bridge length is 692' and stands 53’ above the riverbed. (From www.oldhalifax.com)

Page 22: The Huguenot Memorial Bridge was constructed in 1949 and is considered a major transportation artery over the James River connecting Richmond city limits to the south and Henrico County to the north via Huguenot Road (Route 147). It carries more than 28,000 vehicles per day on average. The bridge is one lane in each direction with a pedestrian sidewalk and no shoulders. The bridge is one lane in each direction with a pedestrian sidewalk and no shoulders. (From VDOT)

Page 28: Humpback Bridge in Covington stood derelict from 1929-1954 and was used by a farmer to store hay. Built in 1857, it is Virginia's oldest covered bridge and spans 100 feet over Dunlap Creek. It is 4-feet taller at its center, which gives the appearance of its humpback. It is located on Route 60 just off exit 10 from I-64. (From Virginia Tourism Corporation)

Pages 30 and 31: New River Gorge Bridge is a steel-arch bridge and was for many years the longest in the world of that type. Its arch extends 1700 feet. New River Gorge Bridge carries U.S. Highway 19 over the New River and the CSX railroad at a height of 876 feet, making it the highest vehicular bridge in the Americas, and the second-highest in the world. (From wvepostcards.com)
I've seen the bridge and the bridge is long
And they built it high and they built it strong
Strong enough to hold the weight of time
Long enough to leave some of us behind

chorus:
And every one of us has to face that day
Do you cross the bridge or do you fade away
And every one of us that ever came to play
Has to cross the bridge or fade away

Standing on the bridge looking at the waves
Seen so many jump, never seen one saved
On a distant beach your song can die
On a bitter wind, on a cruel tide

[repeat chorus]

And the bridge it shines
Oh cold hard iron
Saying come and risk it all
Or die trying

[repeat chorus]