



**Public Agency Risk Managers  
Association**

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● **STRATEGIC**  
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● **FRAMEWORK**  
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● **and 2013-2015**  
● **Strategic Plan**

**April 2, 2013**

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# PARMA

## Strategic Framework and Plan: 2013-2015

### Definition of Terms

**Mission:** a statement of the organization's core purpose and indispensable value for those it serves.

**Vision and Long-term Goals:** a description of the organization in a desired future state, operating at a level of performance required to fulfill its mission.

**Key Issues:** strategic areas for change that should be addressed in the current planning cycle; action taken in these areas will move the organization forward in achieving its vision.

**Objectives:** measurable results that must be accomplished with regard to each key issue.

**Strategies:** the best means or approaches to achieving the objectives, based on insight gained from assessment of the external and internal environmental, and performance of current programs, services and initiatives.

**Priorities/Year One Deliverables:** expectations for how action and resources should be focused in the first year of the Plan, in an effort to implement strategies and accomplish objectives.

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# PARMA Strategic Framework

## PARMA Identity and Mission Statements

### Identity Statement

PARMA is a professional community of California public agency personnel with responsibility for risk management, and a network of risk management service providers.

### Mission Statement

PARMA is dedicated to providing relevant, career-long educational opportunities, information on the latest risk management trends and best practices, and the resources public entities need to manage a broad spectrum of risk in an ever-changing environment.

## PARMA Vision and Long-term Goals

### *Vision Statement*

To be the premier authority and resource for the practice of risk management in California public agencies.

### *Long-term Goals*

#### PARMA Value for Members

1. PARMA is the source for year-round, local and state-wide educational opportunities for risk management professionals at each stage of their career.
2. PARMA is an affordable, accessible resource of professional information, best practices and tools for all those with risk management responsibility in California public agencies.
3. PARMA is a professional community that values and fosters the exchange of experience, expertise and ideas between members.

#### Leadership for the Profession

4. PARMA is respected by public agency employers, elected leaders, professional organizations and others as the authoritative voice for the risk management profession in California.

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5. PARMA is recognized as the preferred source for risk management information, education and networking opportunities for California public agency personnel.

#### PARMA Communication and Outreach

6. PARMA has built a communications infrastructure for regular, substantive contact with its members and other constituents.
7. PARMA is a highly visible, growing organization with a strong presence within the profession.
8. PARMA and its chapters work as partners to deliver strong, consistent value to members and the risk management profession at both the local and state levels.

#### PARMA Governance and Operations

9. PARMA is a focused, efficient organization with the leadership, staffing and financial means to respond to the changing needs and expectations of risk management professionals and the public agencies they serve.

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# 2013-2015 PARMA Strategic Plan

NOTE: an asterisk (\*) indicates issues considered most critical in the short-term

## PARMA VALUE FOR MEMBERS

### **Issue: Evolution of the Conference**

**Objective 1:** Ensure the PARMA Annual Conference continues to reflect the latest in professional education content, delivery and attendee experience.

*Strategies (in priority order)*

1. Develop certificate tracks to support attendee career development (e.g., ergo-workstation evaluation; risk management 101; property loss evaluation, etc.).
  - a. Ensure session level and topic diversity (e.g., basic RM, advanced RM, safety, etc.)
2. Continue to evolve the Conference app.
3. Incorporate CEU-MCLE program credits.

**Year One Deliverables:**

- Identify the most viable and relevant certificate tracks (evaluate past programs, speakers, etc.) (4 votes)
- Maintain the process to identify program levels and categories, ensuring a range of needs. (0 votes)
- Identify desired key elements of the Conference app (establish a committee to review). (1 vote)
- Establish a committee to pursue CEU/MCLE credits for programs. (6 votes)

### **Issue: \*Year-round Education Delivery**

**Objective 2:** Maximize technology to promote and deliver educational opportunities for risk management professionals year-round.

*Strategies (in priority order)*

1. Encourage chapters to coordinate and deliver programming regionally.
2. Develop and maintain a Master Calendar on the PARMA web site of all PARMA and chapter events and programs.
3. Conduct PARMA webinars.

**Year One Deliverables:**

- Add development and maintenance of a Master Calendar to the chapter officer training. (2 votes)
- Test the Master Calendar. (0 votes)
- Charge the Technology Committee with exploring the scope and delivery of webinars at the PARMA and chapter levels. (9 votes)

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**Issue: Chapter Programming**

Objective 3: Support the development and delivery of quality chapter programs that provide relevant information and highly valued local networking opportunities.

*Strategies (in priority order)*

1. Standardize minimum requirements for chapter programming and operations, allowing for ability of chapter to meet differing local needs.

**Year One Deliverables:**

- Establish minimum meeting and operational standards for PARMA chapters (including where chapter have discretion to meet unique local needs). (2 votes)

**Issue: \*Professional Resources and Tools**

Objective 4: Develop and maintain a PARMA library of risk management practice tools and resources.

*Strategies (in priority order)*

1. Continue development of the PARMA web site.
2. Establish a Best Practices Committee (for the content library), and include at least one Board member.
3. Tap into resources and tools that may already be available from various sources.

**Year One Deliverables:**

- Roll out the web site and related training at April meeting. (See Objectives 15 and 18) (22 votes)
- Solicit members for participation on a Best Practices Committee. (3 votes)
- Identify parameters and scope for best practice content, the process to filter best practice ideas, and best practice topics/issues that can be develop easily. (0 votes)

**Issue: Networking and Support**

Objective 5: Deepen the opportunities for members to interact and support each other's professional growth and success.

*Strategies (in priority order)*

1. Develop a PARMA mentor program.
2. Develop an online member expert directory (by subject).

**Year One Deliverables:**

- Identify and evaluate what worked and what didn't work with the prior PARMA mentor program. Define the scope of a new mentor program going forward. (0 votes)
- Identify the scope and elements of a member expert directory (coordinate with web site development). Provide the means for members to input their member profile data at the 2014 PARMA Conference. (9 votes)

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## LEADERSHIP FOR THE PROFESSION

### *Issue:* **PARMA Image and Identity**

Objective 6: Build a clear, consistent, well communicated PARMA brand.

*Strategies (in priority order)*

1. Hire a PARMA executive director who can secure marketing and PR expertise to help establish the PARMA brand.
2. Communicate with members on a regular basis regarding what PARMA is doing to improve value.
3. Conduct a personal touch/outreach campaign (using PARMA and chapter leaders and the executive director) to contact local public agencies not attending local meetings or the Conference.

**Year One Deliverables:**

- Research needs for a PARMA executive director to support implementation of PARMA goals and operations. (See Objective 15) (24 votes)

### *Issue:* **Public Relations for the Profession**

Objective 7: Elevate PARMA as the voice of the risk management profession for California public agencies.

*Strategies (in priority order)*

1. Have a regular presence (e.g., participation, booth, etc.) at other organizations' conferences. Target organizations where agency CEOs attend.
2. Develop tools for members to make presentations on risk management issues within their own agencies.
3. Create partnerships with associate members/sponsors to be listed as a resource on their web sites.

**Year One Deliverables:**

- Identify the conferences and/or organizations where PARMA should have a presence for greatest impact. (10 votes)

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## PARMA COMMUNICATION AND OUTREACH

### *Issue:* **\*Regular Member Communication**

**Objective 8:** Establish routine form(s) of member communication with timely information on the risk management profession and PARMA activities.

#### *Strategies (in priority order)*

1. As needed, send 'alerts' from the PARMA President/Vice President to members (e.g., when a new law passes).
2. On a regular schedule, distribute a 'PARMA Facts' e-newsletter (including such things as legal opinions, professional news/trends, PARMA and chapter activities, etc.)
3. Ask chapter officers to produce and distribute to all chapter members a chapter meeting review.
4. Ask chapters to develop and distribute meeting notices to members on a more regular basis.

#### **Year One Deliverables:**

- Identify what qualifies as an 'alert' and the process for development and distribution. (0 votes)
- Identify the format and suggested content for a regular member communication, like an e-newsletter, and how often to distribute it. (0 votes)
- Ask chapters to produce recaps of their meetings and send to the Board. (0 votes)
- Ensure chapter meeting notices are developed and distributed on a regular basis. (3 votes)

### *Issue:* **Membership Development**

**Objective 9:** Develop and implement an ongoing strategy to build and retain PARMA membership.

#### *Strategies (in priority order)*

1. Encourage members to input employees from their agency into the PARMA database.
2. Encourage chapter secretaries to input chapter members/employees into the PARMA database.
3. Obtain CAJPA's (and other's) list of attendees and solicit to join and/or add to PARMA's mailing list for Alerts, etc.
4. Attend other organizations' conferences and ask exhibitors to join, sponsor and/or exhibit at PARMA.

#### **Year One Deliverables:**

- E-mail or call members asking them to input their agency employees into the PARMA database. (0 votes)
- Train chapter officers on how to input their members/employees. (0 votes)
- Contact targeted organizations for a member and meeting list exchange. (0 votes)



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**Issue: Outreach to New/Young Professionals**

**Objective 10:** Position PARMA as the source of information, education and support for young professionals and those new to risk management.

*Strategies (in priority order)*

1. Identify schools for student outreach. Offer speakers on the direction of risk management, introduce students to PARMA, and encourage students to attend chapter meetings.
2. Develop and award scholarships to high school and college students.
3. Develop an active mentoring and coaching program.

**Year One Deliverables:**

- Research which schools would be targets for student outreach. (2 votes)
- Identify dollar amounts and types of scholarships to make available to students (for education, Conference attendance, etc.). (3 votes)
- Identify mentor, mentees and coaches. (0 votes)

**Issue: \*PARMA-Chapter Relations**

**Objective 11:** Strengthen communication and mutual support between PARMA and its chapters as partners in serving, engaging and growing members and future leaders.

*Strategies (in priority order)*

1. Provide more leadership and direction from the PARMA Board to the chapters.
2. Conduct quarterly conference calls between the PARMA President/Vice and chapter leaders.
3. Provide chapters with templates for chapter meeting notices and evaluations, etc. to ensure consistency in the PARMA brand.
4. Provide guidelines and suggestions for chapter program content.

**Year One Deliverables:**

- Define and clarify PARMA Board and chapter structure, and what direction, reporting and regular communication is needed. (7 votes)
- Schedule and conduct President/Vice President-Chapter Leader conference calls quarterly. Determine the purpose, agenda, format, etc. (9 votes)
- Identify chapter templates needed and create. (3 votes)
- Identify suggested chapter program content and guidelines. (0 votes)

**Issue: Outreach to Related Organizations**

**Objective 12:** Identify and cultivate productive relationships with professional organizations to support PARMA goals.

*Strategies (in priority order)*

1. Provide a history of PARMA on the web site.
2. Provide links on the web site to other organizations and individuals who can act as professional resources for members.

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3. Work with other organizations to provide tips, best practices and risk management tools for PARMA members.

**Year One Deliverables:**

- Determine who will write and contribute to a PARMA history. (0 votes)
- Research the organizations and individuals who can act as resources for members that PARMA can link to on the web site. (0 votes)
- Identify organizations to work with on tips, best practice and risk management tools. (5 votes)

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## GOVERNANCE AND OPERATIONS

### **Issue: \*Leadership Development/Member Involvement**

**Objective 13:** Identify and cultivate a replenishable pool of qualified, committed volunteers and leaders for PARMA and its chapters.

*Strategies (in priority order)*

1. Develop a PARMA committee structure based on Plan priorities identified to get more members involved.
2. Clarify roles, create better job descriptions and system to monitor performance.
3. Launch an initiative for members to complete their profiles on the new PARMA database system (promote at chapter level, use computer portals at Conference, etc.)

**Year One Deliverables:**

NONE

### **Issue: Board Development and Effectiveness**

**Objective 14:** Deliver the orientation, training and support necessary for the PARMA Board to provide strong, visionary leadership for the Association.

*Strategies (in priority order)*

1. Develop and adhere to a regular planning cycle to update PARMA goals and priorities, and to direct use of human and financial resources.
2. Conduct Board orientation and training on a regular basis.
3. Develop a succession strategy for PARMA Board and chapter leadership.

**Year One Deliverables:**

NONE

### **Issue: \*Staff Capacity and Structure**

**Objective 15:** Identify, build and organize the PARMA staff needed to effectively manage operations, build programs and services and provide strong support to the Board and the members.

*Strategies (in priority order)*

1. Secure an IT resource to get web site and member software up and running.
2. Identify staffing levels and needs for operations and programming
3. Clarify where committees can be used and where staff may be necessary.
4. Investigate models for staffing, evaluating others' models to understand options.

**Year One Deliverables:**

- Secure the services of an IT professional to finalize development of web site and member database system and to conduct training. (See Objective 18) (22 votes)
- Determine committee structure needed. (3 votes)
- Evaluate staffing models (research other organizations), and define executive director scope, roles and skills needed. (See Objective 6) (24 votes)

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**Issue: Financial Capacity**

**Objective 16:** Develop a stable mix of revenue sources to support implementation of PARMA goals and priorities.

*Strategies (in priority order)*

1. Evaluate current PARMA revenue sources.
2. Identify value and expectations for the PARMA-sponsor relationship (including sponsor packages that include state-wide and local opportunities).
3. Evaluate potential new sources of revenue.

**Year One Deliverables:**

- Evaluate current revenue sources and explore possible new sources. In addition, evaluate flow of revenue between PARMA and chapters. (3 votes)
- Explore a coordinated process to develop sponsor packages and to generate sponsor funding direct to PARMA with criteria for distribution to chapters. (4 votes)
- Work to retain and recognize long-term PARMA sponsors. (6 votes)

**Issue: PARMA Structure**

**Objective 17:** Evaluate and adjust the PARMA governance and membership structure as required to reflect organizational needs and change in the profession.

*Strategies (in priority order)*

1. Evaluate current membership categories and structures.
2. Evaluate current Board composition and structure.

**Year One Deliverables:**

NONE

**Issue: \*PARMA Operating Systems**

**Objective 18:** Ensure PARMA operating systems have the capacity to support Association program and membership growth.

*Strategies (in priority order)*

1. Secure the services of an IT professional.
2. Finalize reboot of web site.
3. Get new member database software up and running.
4. Create a plan to promote the new web site and provide training.

**Year One Deliverables:**

- Secure the services of an IT professional to finalize development of web site and member database system and to conduct training. (See Objective 15) (22 votes)

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# PARMA Strategic Plan: 2013-2015

## OVERALL STRATEGIC PRIORITIES

*Among many other important initiatives for the year, PARMA will focus particular attention to achieving the following critical priorities in 2013 to advance its mission.*

### **In 2013, PARMA will . . .**

- Charge the Technology Committee with exploring the scope and delivery of webinars at the PARMA and chapter levels. [Objective 2]
- Secure the services of an IT professional to finalize development of web site and member database system and to conduct training. [Objectives 4, 15 and 18]
- Identify the scope and elements of a member expert directory (coordinate with web site development). Provide the means for members to input their member profile data at the 2014 PARMA Conference. [Objective 5]
- Evaluate staffing models (research other organizations), and define executive director scope, roles and skills needed. [Objectives 6 and 15]
- Identify the conferences and/or organizations where PARMA should have a presence for greatest impact. [Objective 7]
- Schedule and conduct President/Vice President-Chapter Leader conference calls quarterly. Determine the purpose, agenda, format, etc. [Objective 11]