

# MFOA: What Have We Done for You Lately?

2018 Annual Conference

**An Ensemble Cast of MFOA Staff**



# Our Management Team

**Executive Director:** Dan Cowin

**Policy:** Colin Macdonald (A), Shira Babins in Nov.

**Membership and Outreach:** Donna Herridge

**Training:** Krista Klesch

# Serving our Members

- Our staff are committed to member service
- To serve you better we need to know what you need and how we can best meet your needs
- Get involved in your association. Talk to our staff. Email us. Give us a call. Chat us up at the conference!!
- WE LOVE HEARING FROM YOU!!

# Policy

# MFOA Policy

Builds capacity and champions members' perspectives on municipal finance issues through:

## **Research and Analysis**

Contribute to informed discussions

## **Sector Engagement**

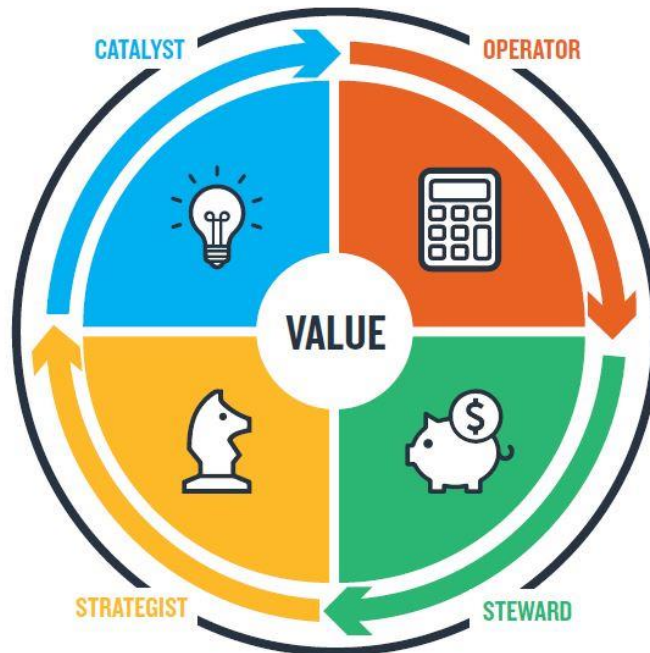
Share information, connect and advise members

## **Government Relations**

Engage the government and other organizations publicly and behind the scenes

# Transforming the Treasurer

## THE EVOLVING ROLE OF THE MUNICIPAL TREASURER/CFO



### OPERATOR

CFOs deliver efficient finance operations including Procurement, Accounts Payable, Cash and Revenue Management, Property Tax, Payroll among other financial transactions.



### STEWARD

CFOs safeguard municipal assets, ensure Council and management are well-informed through budget development, analysis, regular financial reporting, audits and compliance with legislation.



### STRATEGIST

CFOs are key contributors to strategic planning and the municipality's future direction including community engagement. Developing innovative financing and investment strategies to support long-term plans are critical for financial stability.



### CATALYST

CFOs drive change and process improvements through business partnerships, cost reduction strategies, innovative procurement and service delivery approaches. Managing risk and leveraging technology drive results and opportunities.

# Transforming the Treasurer

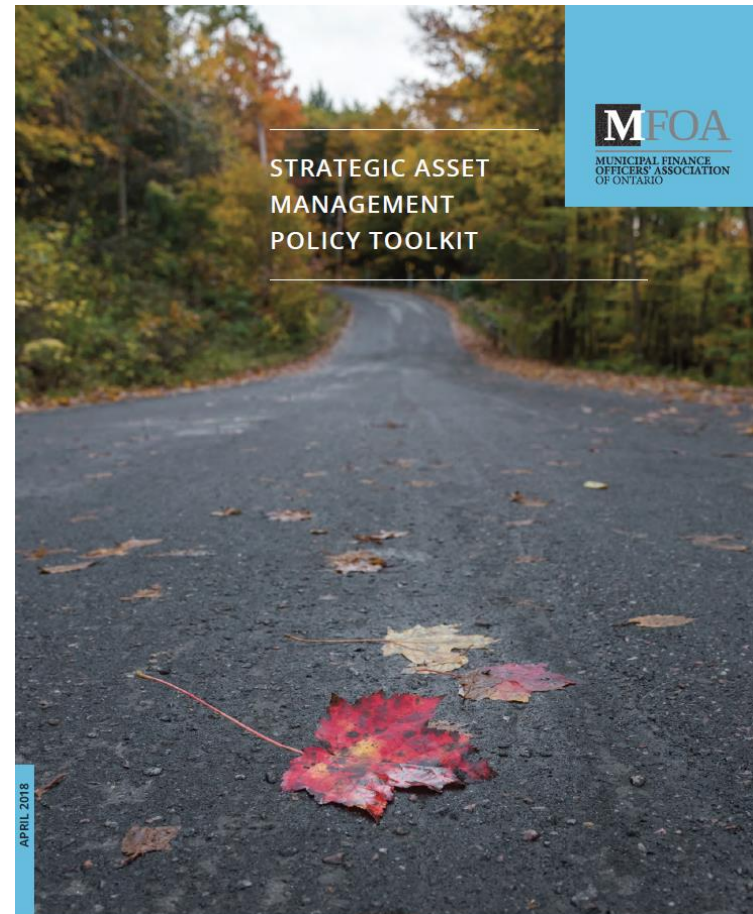
Will be released in a five part series

First part was released in September 2018

An in-depth overview of each of the four competencies (Operator; Steward; Strategist; and Catalyst) will be published throughout the remainder of 2018

# SAMP Toolkit

- Comprehensive toolkit to developing a Strategic Asset Management Policy in compliance with O. Reg. 588/17
- Developed with 10 municipalities
- Includes case studies, worksheets, sample policy language and more





# AM – Communities of Practice

## **Guide to AM Communities of Practice**

Provides practical recommendations for the development of AM Communities of Practice

## **Case studies**

Showcasing examples of AM communities of practice in Ontario

1. Perth Community of Practice
2. AMOntario

# Temporary Finance Professionals

A program to link qualified municipal finance professionals with municipalities looking to fill financial positions on a part-time or temporary basis. Employee portal launched July 2018. Sign up today! Employer portal launching in Fall 2018.

# Coming in 2018

## Updated property tax monograph

"Property Taxation in Ontario: A Guide for Municipalities" serves as a primer and high level introduction to property taxation in Ontario.

## Asset Management Resources website

Delivered in partnership with AMOntario



# Corporate Services

# AMP It Up 2.0

## **Funded by MOI & MFOA**

In-person expert Asset Management Plan assessment and localized action plan developed for each municipality (Municipal Action Plan)

All municipalities under 25,000 pop'n in groups starting with under 5,000

# Key Dates

## **Group 1**

September 24 – on-line applications – population < 5,000  
(first 80)

## **Group 2**

December '18 – population < 5,000 (next 70)

## **Group 3**

April '19 – population < 10,000 (next 60)

## **Group 4**

August '19 – population < 25,000 (next 50)

# Overview of AMP it Up 2.0

## – Group 1



# New Communication and Engagement Strategy - Objectives

Demonstrate value to members across Ontario

Expand MFOA value as a central resource and Thought Leader

Foster ACTIVE member engagement and networking



# New Communication and Engagement Strategy - Recommendations

1. Invest in communications and engagement expertise
2. Commitment to improved member experience and database management
3. Segment Membership for targeted outreach
4. Focus on measuring and evaluating results

# New Communication and Engagement Strategy

**STAY TUNED**

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# Education & Training

# Education & Training

- **We provide** members with training and education to enable capacity building, continuous professional development and to support excellence in municipal finance.
- **We provide** a broad training approach to meet the diverse needs of our members. We offer in person courses and workshops, live and on-demand webinars, live stream workshops, **now** live stream for our Annual conference... and more!
- **We offer** a wide range of relevant topics. Topics are prioritized based on your input – if you see a training gap, please let me know

# Benefits

**Now Available! e-Learning:** learn at your own pace from your computer at a time and location that is convenient for you! First up...*Municipal Finance 101 – A Fundamentals Course.*

## Staff

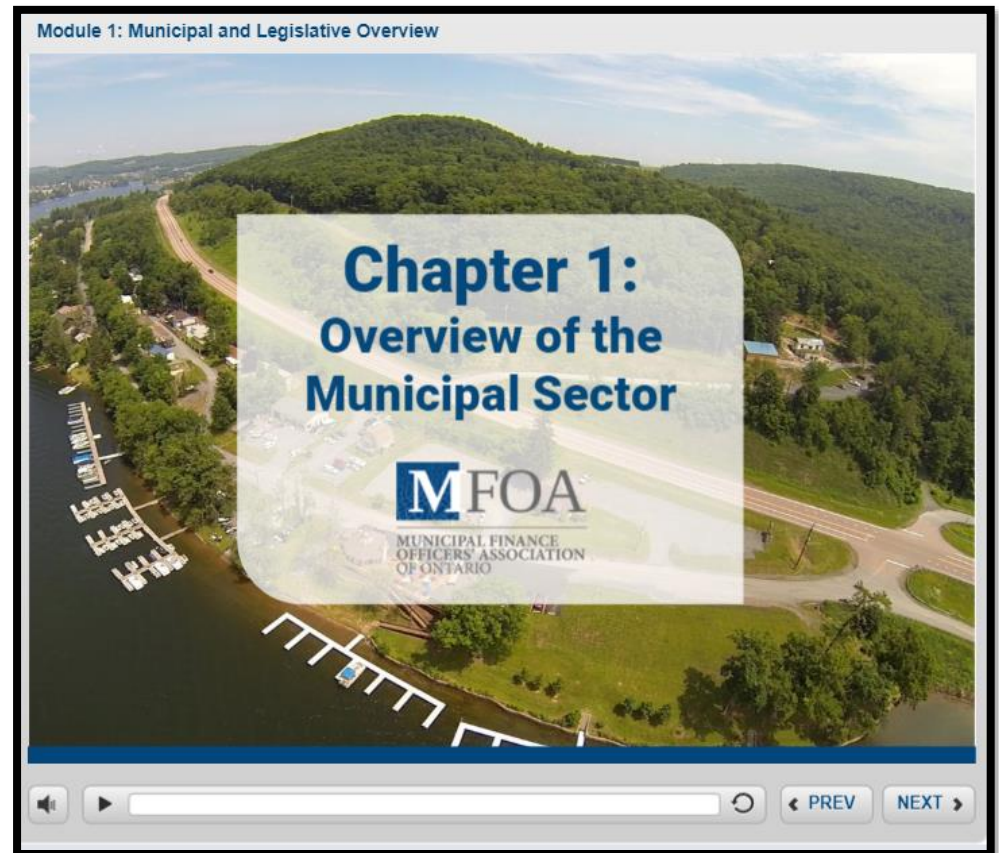
- Learn at your own pace
- Personalized learning plan
- Flexible around your schedule
- Save on travel time

## Municipality

- Onboard training readily available for new/existing staff
- Time savings
- Eliminate travel and accommodation costs

# Features

- Pre and post tests to help measure your learning
- Interactive activities
- Responsive design
- Intuitive navigation
- Multiple learning channels
- Practice and feedback
- Free trial available before registering



# Questions?