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| **Logo, company name  Description automatically generated** | **County Employees Management Association**  **1654 The Alameda, Suite 110, San Jose, CA 95126**  **408.289.9691 | www.sccema.org** |

**CEMA 2022 Work Plan**

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| **Item** | **Lead** | | **Q1** | **Q2** | **Q3** | **Q4** |
| **Priority 1: Move into new office space/location** | | | | | | |
| 1. Finalize agreement with ­OE3 to support CEMA’s new lease for new office space/location | OE3 | |  |  |  | X |
| 1. Acquire a list of pre-approved office locations from OE3 for CEMA to choose | Dolores Morales and Tim Neep | | X | X |  |  |
| 1. Tour and select new office location for Board approval | Dolores Morales and Tim Neep | |  | X | X |  |
| 1. Acquire new office equipment for office furnishing, budgeted and paid by OE3 | Robin, Jim, and CEMA Staff | |  |  | X | X |
| 1. Move office equipment and items into new office space/location | CEMA Staff | |  |  | X | X |
| 1. Promote/announce new office space/location | Exec Board and CEMA Staff | |  |  | X | X |
| 1. Host an event at the new office space/location | Exec Board and CEMA Staff | |  |  |  | X |
| **Priority 2: Hire webmaster services for new website creation and maintenance** | | | | | | |
| 1. Research and interview various vendors for webmaster services | Communications Committee | | X | X |  |  |
| 1. Budget for webmaster services | Exec Board | |  | X | X |  |
| 1. Launch revamped website | Exec Board and CEMA Staff | |  |  | X | X |
| 1. Monitor for issues and changes for the website as part of monthly maintenance by the webmaster | Communications Committee | |  |  | X | X |
| **Item** | **Lead** | | **Q1** | **Q2** | **Q3** | **Q4** |
| **Priority 3: Grow membership to 80%** | | | | | | |
| 1. Host New Employee Orientations (NEOs) to capture new, non-member employees | CEMA Staff | | X | X | X | X |
| 1. Create a (3-minute) video about the benefits of CEMA membership | Exec Board and CEMA Staff | |  |  | X | X |
| 1. Have additional videos of members recounting CEMA membership benefits | CEMA Staff | |  |  | X | X |
| 1. Take videos and photos to promote CEMA activities | Exec Board and CEMA Staff | |  |  | X | X |
| 1. Have a promotional month where new membership applicants are eligible for prize drawings | Membership Committee | |  |  |  | X |
| 1. Email non-members to encourage membership | Membership Committee | |  |  |  | X |
| 1. Recruit and organize more CEMA Liaisons | Liaison and Membership Committee | | X | X | X | X |
| 1. Host a CEMA Liaison training | Adam Cole | |  |  | X |  |
| 1. Host Professional Development events | Professional Development Committee | |  | X |  | X |
| 1. Distribute “welcome bags” to new members and/or shipping to new members | Membership Committee | |  |  | X | X |
| **Priority 4: Incorporate Monterey County and hire a 4th Business Agent** | | | | | | |
| 1. Get formal recognition by the future Monterey Chapter for CEMA to be its official bargaining unit | Zeb Feldman | | X |  |  |  |
| 1. Build stronger connections with the Monterey Board of Supervisors | Monterey Chapter, PAC, and CEMA Staff | | X | X | X | X |
| 1. Schedule dates and times to meeting with members of the Monterey Board of Supervisors | Monterey Chapter, PAC, and CEMA Staff | |  |  | X | X |
| 1. Place Monterey Chapter members on the Monterey Labor Council Advisory Council | Monterey Chapter and Exec Board | |  |  | X | X |
| 1. Connect Monterey Chapter with Monterey Labor Council | Monterey Chapter and Exec Board | |  |  | X |  |
| **Item** | | **Lead** | **Q1** | **Q2** | **Q3** | **Q4** |
| 1. Train Monterey Chapter Advisory Council | Zeb Feldman and Exec Board | |  |  | X | X |
| 1. Schedule a date and time for training | CEMA Staff | |  | X |  |  |
| 1. Develop a training program (bargaining, Brown Act, etc.) | CEMA Staff | |  | X |  |  |
| 1. Hold an in-person training for Monterey Chapter Advisory Council | CEMA Staff | |  |  | X | X |
| 1. Onboard a 4th Business Agent | Zeb Feldman | |  |  | X | X |
| 1. Work with OE3 to finalize an agreement for the hiring of 4th Business Agent | Zeb Feldman | | X | X |  |  |
| 1. Train the 4th Business Agent | Zeb Feldman | |  |  | X | X |
| **Priority 5: Create a CEMA Policies and Procedures Manual** | | | | | | |
| 1. Identify specific policies and procedures to be part of the Manual | Exec Board and Committees | |  |  | X | X |
| 1. Conduct work meetings to identify and create policies and procedures | Exec Board and Committees | |  |  | X | X |
| 1. Organize the Manual through SharePoint and/or LiveBinders | Exec Board and CEMA Staff | |  |  |  | X |
| 1. Publish the Manual on the CEMA website | Exec Board and CEMA Staff | |  |  |  | X |
| **Priority 6: Procure and distribute more CEMA paraphernalia** | | | | | | |
| 1. Acquire a more diverse array of CEMA paraphernalia | Membership Committee | |  | X | X | X |
| 1. Notify members of the new selection of CEMA paraphernalia through CEMA Voice | Membership Committee | |  |  |  | X |
| 1. Distribute a new selection of CEMA paraphernalia | Membership Committee | |  | X | X | X |
| 1. Attend Stars and Stripes (July) | Exec Board and CEMA Staff | |  |  | X |  |
| 1. Attend Day on the Bay (October) | Exec Board and CEMA Staff | |  |  | X |  |
| **Priority 7: Create a CEMA Succession Planning Policy** | | | | | | |
| 1. Conduct work meetings to create and present the Policy to the CEMA Executive Board for approval | Exec Board and CEMA Staff | |  |  | X | X |
| **Item** | | **Lead** | **Q1** | **Q2** | **Q3** | **Q4** |
| **Priority 8: Improve document storage and access** | | | | | | |
| 1. Clean up CEMA’s SharePoint | Exec Board and CEMA Staff | |  | X | X | X |
| 1. Provide a navigation guide to CEMA’s SharePoint | Exec Board and CEMA Staff | |  |  | X | X |
| 1. Provide a brief presentation to the CEMA Executive Board about the new SharePoint | Exec Board and CEMA Staff | |  |  | X | X |
| **Priority 9: Diversify financial investments and accounts** | | | | | | |
| 1. Research and interview various financial advisors | Finance Committee | | X | X |  |  |
| 1. Report to the CEMA Executive Board of recommendations for a financial advisor’s services | Finance Committee | |  | X |  |  |
| 1. Create and present an Investment Policy Statement for CEMA | Finance Committee | |  | X | X |  |
| 1. Split CEMA funds across multiple different bank accounts and institutions | Finance Committee | |  | X | X |  |
| **Priority 10: Acquire IT services for CEMA** | | | | | | |
| 1. Develop and distribute requests for proposals for IT services | Communications Committee | |  | X | X |  |
| 1. Secure a contractor to provide IT services | Communications Committee | |  |  | X | X |

Approved by the CEMA Executive Board May 5, 2022