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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