

2017 Annual Report

March 2018

Board of Directors

Executive Board

President	John Cannon, PW
Vice-President	Jessica Short, PW
Secretary	Valerie Osmond, ESD
Treasurer	Rachel VanderVeen, Housing
Retiree Rep	Sarah Nunes, Retiree
Past President	Kathy Lang, ESD

Directors

Communications	Jessica Short, PW
Membership	Claudia Chang, ITD
Professional Development	Kathy Lang, ESD

Members-at-Large

Kevin Lee	CAO
Gloria Schmanek	CMO
Ashwini Kantak	ESD
Jennie Loft	ESD
Dhez Woodworth	OED Work2Future

Message from the President

Greetings and Welcome to the SJMA 2017 Annual Report. We've had an exciting year at SJMA and have seen our membership rise to take leadership of many of the challenges that faced San Jose over the past year. Starting with the President's Day flood of February 2017, our membership played a key role in the response and recovery efforts in the days and months following this tragic event. Our Board would like to thank all our members who helped in that effort.

We have placed a renewed emphasis on professional development and have planned and held several events that we

hope you have found useful and interesting. This next year will build on that momentum and we are planning a number of events and opportunities that we hope you'll take advantage of. I would like to send out a special thanks to **Kathy Lang** for providing the energy and ideas to move this effort along.

The past year also saw the departure of two longtime Board members – **Leslie Hallenbeck** and **Dan Tong**. On behalf of the Board and the membership I want to thank them for their long service to SJMA and the City, and wish them the best in their future endeavors. We

look forward to seeing them at future SJMA events. But with sad departures come welcome new energy, and we are pleased to have **Sarah Nunes** (Retiree, HR) and **Kevin Lee** (CAO) join the board. Their ideas and enthusiasm will help shape the organization. Thanks also to all of the Officers and the Board of Directors for their continued support of SJMA, and their service to the City.

We have an exciting year planned, continuing our mission of supporting our membership and the City's Management team. Look for an exciting slate of events in the coming months - we aim to strike a balance between fun, family, arts, sports, professional development and community-serving events. And as always, we encourage and value your ideas and participation.

Thank you for your membership, your support and for another great year ahead!

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Membership Director's report

Currently, SJMA has 214 members of which 193 are current employees, 19 are retirees, and two are associate members. The composition of membership is changing with a large percentage of new members being current employees compared to

retirees and associates. Our primary method for communication is via email so be sure to have a current email on file so you won't miss out on any of our exciting events.

2017 and 2018 Annual Budget

San Jose Management Association 2017 & 2018 Budget

Revenue

	2017 Budget	2017 Actual	2018 Budget	Notes
January 1, 2016 Cash Balance	\$ 14,447	\$ 25,009	\$ 23,971	
City Employee Dues	\$ 14,118	\$ 11,484	\$ 13,000	Actual amount is missing four pay periods
Retiree Dues	\$ 720	\$ 433	\$ 720	Budget assumed 20 retirees
Associate Member Dues	\$ -	\$ 153	\$ 100	
Revenue Subtotal	\$ 14,838	\$ 12,070	\$ 13,820	

Anticipated Expenses

	2017 Budget	2017 Actual	2018 Budget	Notes
Event Subsidies				
- BBQ	\$ 5,000	\$ 2,304	\$ 2,500	Actual: Total cost \$2,854; returned Deposit \$550; SJMA cost \$2,304
- Instalation Luncheon	\$ 1,100	\$ 2,063	\$ 2,500	Actual: Total cost \$2,558, amount collected \$495, SJMA cost \$2,063
- Escape Room Event	\$ -	\$ 1,045	\$ -	Actual: Total cost: 1,125, amount collected \$80, SJMA cost \$1,045
- Sharks Game	\$ 400	\$ 534	\$ 550	Actual: total cost \$1,233.71, amount collected \$700, SJMA cost \$533.71
- San Jose Giants Game	\$ 275	\$ 430	\$ 450	Actual: Total cost \$663, amount collected \$233, SJMA cost \$430
- Show Tickets	\$ 400	\$ -	\$ 400	Assuming \$15 subsidy for 25 people
- Paint Night	\$ 350	\$ -	\$ 350	Assuming \$15 subsidy for 20 people
- Golf Tournament	\$ 750	\$ 2,275	\$ 2,200	Actual: Total cost: \$2,849, amount collected \$574, SJMA cost \$2,275
- Happy Hollow Sleepover	\$ -	\$ -	\$ -	Assuming \$15 subsidy for 30 people
- Holiday Event	\$ 1,500	\$ -	\$ 1,500	Assuming \$20 subsidy for 70 people
- Professional Development	\$ 2,500	\$ -	\$ 5,000	Estimate for Professional Development
- Creek Clean Up	\$ -	\$ 123	\$ 150	Cost of lunch
Give Aways				
- Annual "Gift"	\$ 550	\$ 600	\$ 600	Tote bags
- Gift Cards at BBQ	\$ 375	\$ 219	\$ 300	
- Gift Cards at Holiday Event	\$ 350	\$ 375	\$ 300	
Other Expenses				
- Lunch Costs	\$ 1,200	\$ 1,111	\$ 1,200	Budget assumed \$100 for 12 months; Actual does not include two months
- Printing Costs	\$ 525	\$ 38	\$ 100	Budget assumed \$75 for seven events; Actual was \$38 for one event
- Website Hosting	\$ -	\$ 756	\$ 800	Annual cost for Wild Apricot
- Insurance	\$ -	\$ 949	\$ 1,000	Annual cost for insurance
- Banking Fee	\$ -	\$ 39	\$ 36	\$3 Monthly charge
- IRS Fee	\$ -	\$ 247	\$ -	Cost to issue tax ID
- Memorial Gift	\$ -	\$ -	\$ 100	Donation to the Safe Haven Animal Sanctuary in honor of Nancy Alford
Anticipated Expenses Subtotal	\$ 15,275	\$ 13,109	\$ 20,036	
Reserve	\$ -	\$ -	\$ -	Equal to total number of members (207) times annual voucher (\$50)
Projected Year-end Cash Balance	\$ 14,010	\$ 23,971	\$ 17,655	

If you have any questions about the SJMA Budget, please contact Rachel VanderVeen, Treasurer.

SJMA Events

In 2017, SJMA held a variety of social events and professional development opportunities.

San Jose Sharks

On a fun-filled January evening, SJMA members along with family and friends gathered at the downtown Britannia Arms restaurant to enjoy appetizers hosted by SJMA. The party moved to the SAP Center for an exciting hockey game with the Tampa Bay Lightning, cheering wildly as Logan Couture netted the game-winning goal in the third period to lead our beloved Tiburones to a 2-1 victory!

Escape Room

What do you get when you put a group of people into a locked room and tell them to escape? You get FUN! A small but mighty group of SJMA members and guests gathered at Santa Clara's **Beat the Lock** to try the latest group activity craze. We managed to solve all kinds of puzzles that led to our escape! We beat the clock with a mere 15 seconds to spare!



Installation Luncheon

This year the Installation Luncheon was held at Gordon Biersch. We had a special panel due to the extraordinary nature of the rain and flooding in March. Our panel consisted of Dave Sykes, Kip Harkness and Ray Riordan. The panel discussed the City's emergency response and follow up. It was a great tribute to the overwhelming response from City staff both during the event and after.



Guadalupe River Cleanup

This was the second year SJMA participated in the Guadalupe River Cleanup. A small handful of members (including family) participated on a beautiful morning in May. Thanks for making our spaces beautiful!



Member Appreciation BBQ

We look forward to this event every year! This is one way that the Board of Directors gives thanks to our members. This free-to-members event is an opportunity for us to say, "Thanks" with delicious food and giveaways. This year we held the BBQ in the City Hall Rotunda where we enjoyed a BBQ lunch, dessert and lots of door prizes! We even gave away SJMA tote bags to all attendees.



San Jose Giants

The San Jose Giants on July 21, 2017 honored First Responders with a ceremony highlighted by an infield landing of the SJPD helicopter. SJMA members feasted on a delicious BBQ meal at the famous Turkey Mike's, and although the Rancho Cucamonga Quakes prevailed 6-1, the night ended on a high note with a dazzling fireworks show that lit the skies over San Jose Municipal Stadium!

Golf Tournament

The annual SJMA golf tournament is one of our most popular events every year. We tend to see a lot of our Retiree members at this event! Put together a team of four and come out for a fun day on the links!



Holiday Party

Attendees of our annual Holiday Party had a ton o' fun! This year's venue was the outside patio at Gordon Biersch. The restaurant was decked out in its holiday finest, and in addition to a food buffet and holiday beverages, there were games, music, raffle prizes, a lighted photo display of 2017 events, and a very entertaining photo booth,



Lunch with ICMA Conference

This low-key event included lunch-time dessert treats while viewing re-broadcasts of three keynote speakers from the ICMA annual conference.



Director Spotlight



San Jose Management Association

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Developing. Inspiring.
Connecting.
Encouraging. Supporting.

WE'RE ON THE WEB!

SJMA.US

From **Jessica Short (PW)**, Communications Director and Vice President: Have you visited the SJMA website (www.sjma.us) lately? If not, please do! Our main mode of communication with our members is the SJMA website. We use it to advertise events via the email automation features, to manage our events, and to maintain our membership listing. And you can check there to see if you've used your annual voucher yet, or to see what events are coming up. But probably the most fun thing about the website is the photos we post from our fun events throughout the year. Check it out!

From **Claudia Chang (ITD)**, Membership Director: SJMA is about developing, inspiring, connecting, and supporting its members so make it a priority to attend at least one SJMA event this year. Active members receive a new "virtual" event voucher, worth up to \$50, on January 1 annually. The voucher can be applied towards an SJMA-hosted event. Tell your friends about the value of SJMA membership and invite them to an event. Please visit our website at www.sjma.us/join for more information.



2017 Installation Luncheon

From **Kathy Lang (ESD)**, Professional Development Director: Keep your eye on the SJMA Events calendar for more exciting professional development events! We plan on bringing you more free events to help you achieve your career goals and strengthen the City of San José management ranks!

Planned 2018 Events

- Creating Destination Work—Harry Paul
- Installation Luncheon
- Cirque du Soleil—Crystal
- San Jose Giants
- Member Appreciation BBQ

- Annual Golf Tournament
- Rock N Roll Half Marathon
- Holiday Party



2017
SJMA
HOLIDAY PARTY
12.13.2017

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