



# CIS

## Strategic Plan

### 2025-2029

CIS

December  
2025



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# Introduction

December 18, 2025

CIS is pleased to present our updated strategic plan for 2025-29.

On November 3, 2025, the CIS executive team and staff gathered for a strategic planning workshop to reflect on the progress made during year 1 of the strategic plan, identify priorities going into year 2, and discuss how to strengthen implementation of the plan.

To facilitate this process, the City engaged SSW Consulting, a professional facilitation and strategic planning firm. The retreat was aimed at achieving the following:

- Reflect and celebrate progress on year 1 of the 2025-2029 strategic plan
- Strengthen strategic plan implementation and accountability to the plan
- Align priorities and resources for year 2 of the plan
- Strengthen internal communication of the plan to further integrate the plan into the CIS organizational culture

Prior to the retreat, SSW Consulting conducted outreach, including interviews with Goal Leads and an online survey with members of the executive team. This information helped shape the workshop agenda to ensure a productive and engaging experience.

During the workshop, staff collaborated to identify priorities for year 2 of the strategic plan and provide clarity on the implementation structure and roles. In a subsequent executive team meeting, the team refined the strategic initiatives to remove duplicative items and items that have become operational. This collective effort resulted in the updated strategic plan for 2025-2029, as shown on the following pages.

The strategic plan will continue to guide the work of the organization to provide the best service to our members. The main implementation tool of the strategic plan is the SharePoint site, which provides a link to the strategic plan report and a list of strategic initiatives in progress with links to project charters and status reports.



Photography by: Gary Halvorson, Oregon State Archives

# Acknowledgments

The development of the strategic plan was rooted in extensive engagement efforts to create accessible opportunities for all stakeholders to engage meaningfully in the process:

- The Board of Trustees provided direction in the development of the strategic plan;
- The Executive Team guided the work and championed the project;
- Employees provided multiple rounds of input, perspective, and subject matter expertise to inform the plan; and
- Nearly 150 CIS members shared their experiences and ideas.

As a result, the 2025 Strategic Plan aligns priorities and resources to support a strong and unified workforce to deliver the highest level of service to our members. Thank you to everyone who participated in this process.



### **Board of Trustees**

John Shafer, Chair, Umatilla County Commissioner  
Joe Samaniego, Vice Chair, Tangent City Manager  
Taneea Browning, Central Point Mayor  
Derrick DeGroot, Klamath County Commissioner  
Kathryn Greiner, Condon City Administrator  
Gina Firman Nikkel, Executive Director AOC  
SueLing Gandee, Risk Manager Hillsboro  
Patty Mulvihill, LOC Executive Director  
Jeff Rasmussen, Jefferson County Administrative Officer  
Tyler Stone, Wasco County Administrative Officer

### **CIS Executive Team**

Patrick Priest, Executive Director  
Mike Beyrouty, Benefits Director  
Gail Fischer, Property/Liability Claims Director  
Mark Jennings, Director of Risk Management  
Meaghan Johnson, Executive Assistant  
Trent McGath, Underwriting & Analytics Director  
Steve Norman, Administrative Officer  
Tamara Russell, General Counsel  
Eric Yahnke, Chief Financial Officer

### **Project Management Team**

Patrick Priest, Executive Director  
Meaghan Johnson, Executive Assistant  
Sara Singer Wilson, Principal/Owner, SSW Consulting  
Ashley Sonoff, Associate, SSW Consulting  
Sasha Konell, Communications and Engagement Strategist, SSW Consulting

# Strategic Plan Overview

## **What is the purpose of the Strategic Plan?**

The CIS Strategic Plan serves as a guide for the organization over a five-year period. Through extensive engagement across the organization, the plan defines the mission, vision, values, goals, and actions that guide CIS in serving its members and maintaining a resilient and effective organization. The strategic plan is considered a living document, as it is continuously referenced to guide policy decisions, allocation of resources, and the overall direction of the organization. Additionally, the strategic plan is intended to be assessed and updated on a regular basis to ensure the goals and actions are aligned with the priorities and needs of members and staff. In this way, the strategic plan enhances transparency, accountability, and success across the organization.

## **When was the first Strategic Plan adopted?**

The first CIS Strategic Plan was adopted by the Board of Trustees in January 2020 and guided the organization from 2020 through 2024.

## **How often is the Strategic Plan updated?**

The strategic plan implementation process is designed to encompass regular yearly updates and a comprehensive update every five years to remain relevant and responsive. As part of the annual update, specific actions under the overarching goals are evaluated and refined to reflect the needs of CIS members and the organization as a whole. Since the first strategic plan in 2020, the plan has been updated in 2021, 2022, and 2023.

Every five years, the strategic plan undergoes a comprehensive update to conduct thorough engagement with the organization and members; review the mission, vision, and values; and examine the broader environmental context. The comprehensive update ensures the five-year vision is aligned with the mission, values, and supporting goals. The engagement serves a critical role to gather valuable insights and perspectives from members and staff to inform the development of the updated plan as well as build support for the plan and its implementation.

## How is the Strategic Plan updated?

The first comprehensive update to the strategic plan began in October 2023 and over the course of eleven months, the project team sought to achieve the following goals:

- Update CIS's five-year strategic plan for 2025-2029
- Design an engagement strategy that is inclusive of the Executive Team; all staff members, including those new to the team; the Board of Trustees; and CIS members
- Build a strategic plan based on the existing plan framework and develop goals that reflect the current organizational context and member needs.

The following graphic outlines the strategic plan comprehensive update process and timeline:



# Strategic Plan Process

## **Strategic Plan Engagement**

Throughout the process, the project team conducted in-depth engagement throughout the organization, including the Board of Trustees, Executive Team, CIS staff, and CIS member organizations. In alignment with the goal of inclusive engagement, the project team first gathered input from all levels of the organization on how the engagement could be most effective and meaningful. The engagement was designed accordingly and included multiple methods, incorporating interviews, workshops, surveys, all-employee meetings, CIS annual conferences, and two phases of FBU focus groups. The process emphasized multiple engagement points with staff throughout the plan development to ensure all employees had the opportunity to share their perspectives and ideas as well as provide feedback on draft versions of the plan.

## **Executive Team Workshop and Board of Trustees Retreat**

The project team hosted an Executive Team workshop in November and a Board of Trustees retreat in January to review the strategic plan process and build a shared understanding of the current context for the CIS organization to inform the update of the strategic plan. Through a series of facilitated environmental scan exercises, the groups discussed trends and factors affecting the organization in a variety of capacities, including economic climate, political factors, technology factors, member needs, organization needs and trends, and uncertainties looming on the horizon. Additionally, the groups explored the unique strengths, challenges, opportunities, and threats facing CIS to identify potential strategic plan goal focus areas.

## **CIS Member and Staff Surveys**

The project team used two online surveys, one for CIS member organizations and one for CIS staff, to gather input on needs, priorities, challenges, and opportunities to be explored in the strategic planning process. Overall, 131 members and 48 employees completed the surveys. The project team analyzed all responses and categorized the information into common themes, which shaped the strategic plan goal focus areas.

Additionally, the project team met with the League of Oregon Cities and Association of Oregon Counties Boards to gather supplementary input and perspectives.

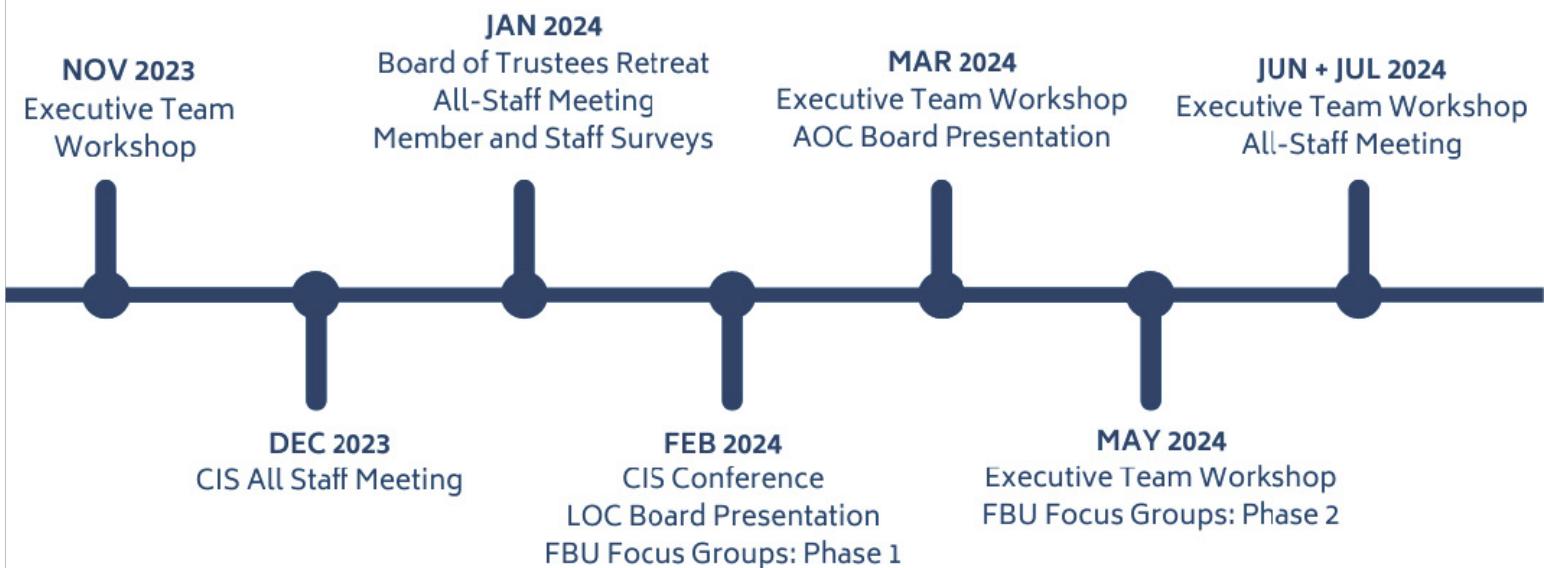
#### Phase 1 FBU Focus Groups

In addition to providing input through the staff survey, the project team met with each FBU for a focused discussion related to the needs, priorities, and opportunities unique to their team and line of business. Overall, 62 staff members participated in the focus groups.

#### Outreach by the Numbers

<b>4</b>	Executive Team workshops
<b>1</b>	Board of Trustees retreat
<b>3</b>	All-staff meetings
<b>1</b>	Annual conference
<b>2</b>	AOC + LOC Board meetings
<b>2</b>	Online surveys
<b>131</b>	Member survey responses
<b>48</b>	Staff survey responses
<b>16</b>	FBU focus groups
<b>77</b>	FBU focus group participants

## Engagement Timeline



## **Strategic Plan Development**

The strategic plan development process connects all the ideas, suggestions, and perspectives gathered through the various engagement methods. These insights were used to develop the goal focus areas, each with desired outcomes to measure success and specific, tangible actions to achieve the goals. Following the outreach and engagement, the project team compiled all the information gathered through the engagement process and reviewed all comments to identify commonalities and themes throughout the data to inform the goal focus areas for the strategic plan and identify potential supporting actions to consider in the development process. The Executive Team gathered for two workshops in March and May to review the engagement themes, discuss the goal focus areas, identify desired outcomes for the goals, and begin the discussion of actions to advance the goals. Additionally, the project team presented the engagement themes and goal focus areas to the FBUs and facilitated a discussion to develop desired outcomes and support actions for each goal area.

The results of the executive team workshops and FBU focus groups guided the development of the goals, desired outcomes, and supporting actions in the strategic plan. The Executive Team reconvened in June and July to review and refine the goals and actions as well as review the current implementation structure and discuss opportunities for enhancement.



Photography by: Gary Halvorson, Oregon State Archives

# CIS Mission, Vision, + Values

The CIS mission, vision, and values were developed through robust engagement with all stakeholders in the development of the 2020–2025 Strategic Plan. Through the 2025–2029 strategic plan engagement, CIS employees confirmed the mission and vision are still relevant to the organization. In anticipation of the strategic planning, an employee workgroup developed new values as part of a thoughtful evaluation of CIS' culture. The workgroup coordinated with the executive team before gaining broad consensus from all employees and the Board of Trustees on what is most important to our organization.

## MISSION

### WHY DOES CIS EXIST?

CIS provides property casualty and employee benefit solutions tailored to the needs of Oregon's cities and counties.

## VISION

### WHERE DO WE WANT TO BE IN FIVE YEARS?

Together, we help Oregon's cities and counties to be safer, stronger, and healthier.

# VALUES

## WHAT GUIDES OUR WORK?

### **Service**

We maintain an unwavering commitment to provide exceptional service, solutions, and support.

### **Stewardship**

We exercise fiscal discipline and safeguard resources with prudence, protection and care for our members and the communities they serve.

### **Integrity**

We strive for alignment between our actions, words, and values. We seek consistency in our interactions, behaviors, and decisions.

### **Innovation**

We are forward thinking – embracing fresh ideas and seeking new ways to help our members navigate changes and improve services.

### **Collaboration**

We listen to and work with members and partners. We engage in cross-departmental teamwork to maintain high productivity and achieve our mutually shared goals.

### **Equity**

We strive to build diverse teams and foster a respectful, inclusive environment where contributions are recognized, authenticity is encouraged, and a sense of belonging is experienced in daily interactions.

# Strategic Plan Goals

Our strategic plan outlines our commitment to achieving our vision in alignment with our mission and values. It is our roadmap to becoming more strategic in addressing the needs of our members while sustaining a strong and adaptive workforce equipped to serve.

The strategic plan engagement resulted in five key goal areas, which capture the priorities, needs, and opportunities on the horizon. Each goal area includes outcomes to define success and supporting actions designed to achieve the goals. The action plan included in the appendix includes the project lead, priority, and additional details to support implementation.

## GOALS

1. Mitigating Risk
2. Managing Costs
3. Communications + Engagement
4. Workforce
5. Technology

# VALUES

- ★ EQUITY
- ★ COLLABORATION
- ★ INNOVATION
- ★ INTEGRITY
- ★ STEWARDSHIP
- ★ SERVICE



## 2025-2029 STRATEGIC PLAN

# GOALS

COMMUNICATE  
+  
ENGAGE

MANAGE  
COSTS

VISION

WORKFORCE

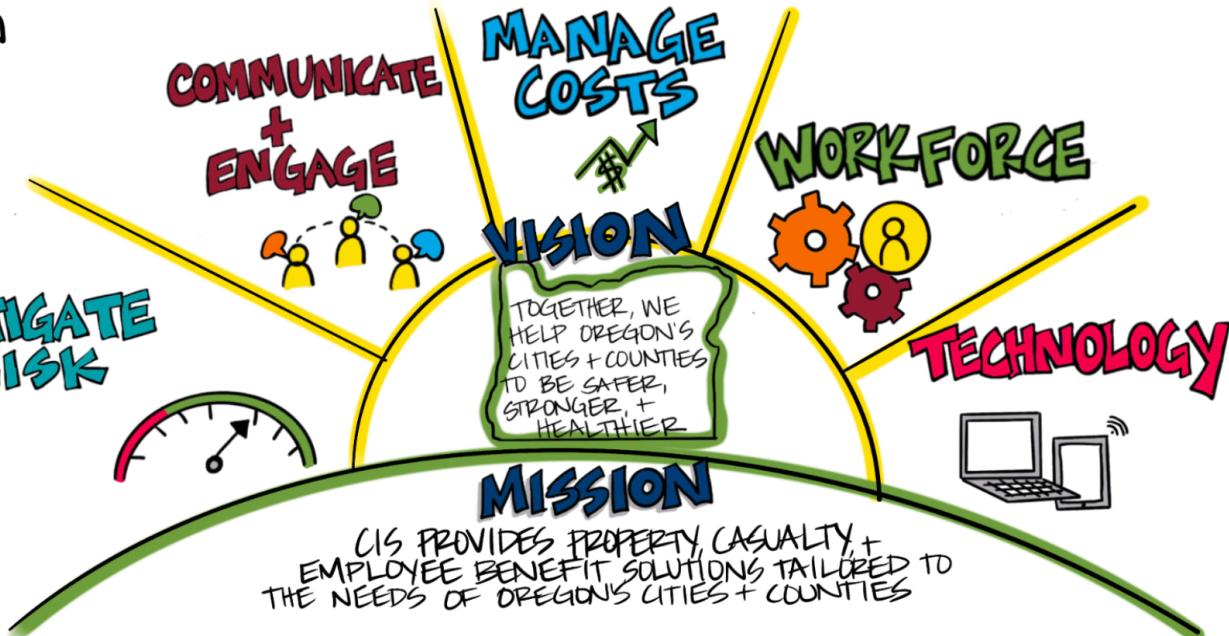
TECHNOLOGY

MITIGATE  
RISK

MISSION

TOGETHER, WE  
HELP OREGON'S  
CITIES + COUNTIES  
TO BE SAFER,  
STRONGER, +  
HEALTHIER

CIS PROVIDES PROPERTY, CASUALTY,  
+  
EMPLOYEE BENEFIT SOLUTIONS TAILORED TO  
THE NEEDS OF OREGON'S CITIES + COUNTIES



# Goal 1: Mitigate Risk

GOAL OUTCOMES	ACTIONS	PRIORITY
Reduce claims for law enforcement	1 Evaluate grant options for wearables to monitor inmate health 2 Encourage and incentivize members to complete annual administrative reviews 3 Research and share mental health and wellness training resources with Public Safety Members 4 Maintain and continue to build relationships with Law Enforcement members and partners 5 Increase grant funding for jail improvements that would mitigate jail deaths 6 Evaluate alternatives for medical care in jails 7 Encourage pre-screening from Police/Sheriff before entering jails	1 1 4 1 3 5 1
Property that is insured to value	8 Offer training and education campaign on property appraisals (educate agents at conferences)	2
Underwriting that is tied to public safety best practices	9 Score and rate law enforcement/jail best practices 10 Evaluate and update deductibles based on claims	1 3
A strategic + focused approach to member training	11 Implement regional training opportunities based on regional trends in risk and claims 12 Develop organizational-wide criteria for when and if members receive training 13 Evaluate what is being offered and what is missing for Member training and examine outside training opportunities	3 1 5
Partnering to mitigate risk for CIS's members	14 Improve internal coordination and communication for articles and publications 15 Increase COG outreach as they have ties with our Members 16 Risk consultants use work comp claims data to better evaluate areas for risk mitigation 17 Targeted advocacy for legislative change on continued health care for incarcerated persons 18 Utilize CRM to create a comprehensive record of each member's history	3 3 1 3 3

# Goal 2: Manage Costs

GOAL OUTCOMES	ACTIONS	PRIORITY
Increased communication + transparency around costs + rates	1 Communicate our competitive advantage and value-added services - develop key messaging across the organization 2 Communicate to members (and agents) a more in- depth/transparent breakdown about what goes into our insurance rates and WHY	1 3
Level the playing field with competitors in benefits	3 Partner with AOC and LOC on advocacy to get the same deal OEEB + PEBB have (hospital claims) 4 Evaluate other Claims payer options 5 Evaluate if merging the EBS and AOCIT Trusts improves their competitive position	1 5 2
Informed financial decision making based on a formal multi-year financial forecast	6 Develop a multi-year financial forecast for all funds and reserves	2
Manage social inflation	7 Collaborate with pools across the country to gather data to inform CIS' legal approach 8 Educate and increase sharing stories around practices with settlements. 9 Advocate for legislative action to mitigate social inflation 10 Plan for CIS leadership, board members, and RMC's to attend trials to learn about the process and build understanding of the experience 11 Host quarterly meetings with other attorneys to share defense tactics	4 3 5 2 1
Costs appropriately aligned with risk	12 Increase analysis on appropriate self insured retention and what we self-insure 13 Produce data that shows training participation and claim correlation	4 2
Service levels aligned with CIS's mission and values, and the fair allocation of resource	14 Align in-person training services with coverage purchased 15 Evaluate offering HR consultation services to Members as an "add-on" service 16 Determine the appropriate scope of services for Members for pre-loss, risk management + legal	5 3 1

# Goal 3: Communicate + Engage

GOAL OUTCOMES	ACTIONS	PRIORITY
Member awareness + understanding of trustee representation and support	1 Provide targeted/strategic opportunities for trustee engagement with members 2 Produce educational materials to share with CIS organization and members, providing an overview of the Board governance and roles 3 Produce education tool kit for Board of Trustees to use to engage members	2 5 4
Agents that support CIS' mission	4 Align resources across FBUs to cultivate relationships with CIS and agents 5 Produce a streamlined welcome packet and introduction process for every new agent (onboarding) 6 Evaluate the commission structure and discounts	3 4 5
Increased engagement with small members	7 Allocate staff to serve as a "Small City/County Expert" for small city members 8 Increase marketing of virtual and one-day conference opportunities for small-member attendees	2 4
Strengthened communications and engagement with members	9 Strategic and consistent narrative and story telling to emphasize the members' role in a healthy pool 10 Evaluate and improve participation at all conferences and events. Provide strategic offerings tied to risk management areas in that geographic location 11 Produce a streamlined welcome packet and introduction process for every new City Manager and Member organization 12 Develop an in-person engagement plan for members that includes each FBU 13 Custom communication strategy for Public Safety Members 14 Custom communication strategy for benefit plan participants	3 2 2 4 3 3
Clearly defined branding and messaging	15 Rebrand CIS to clarify its purpose as a risk pool 16 Update FBU titles and job titles to better represent services and roles 17 Create collateral materials for public purposes such as lobbying to legislators and media inquiries	1 3 2

# Goal 4: Workforce

GOAL OUTCOMES	ACTIONS	PRIORITY
Clarify CIS organizational identity and policies	1 Define culture, mission, and vision for each FBU AND the organization 2 Update the class and compensation study 3 Communicate how pay equity is applied throughout the organization 4 Implement and require annual reviews for all CIS employees	1 3 3 1
Create opportunities for career development	5 Thoroughly communicate opportunities for growth and formalize HR policies for professional development. Refine and communicate standard HR policies: raises, job openings, professional development. 6 Allocate equitable resources for professional development across the organization	1 2
Dedicate resources to support staff's work	7 Continue to allocate resources for succession planning across the organization 8 Dedicate resources for both Human Resources and IT services for the organization's size and need	1 1
Enhance organizational collaboration	9 Create meaningful interactions and collaborative processes which maximize the value of time spent in the office 10 Educate and communicate job descriptions, scope, and Member services of each FBU for internal and external use 11 Feature a different FBU for updates and insights at the monthly all-staff meeting 12 Improve cross-FBU communication and technology compatibility to better collaborate with and serve members 13 Standardize staff recognition to include all FBU's, even those that are not customer facing, and specify employees can recognize one another	1 3 4 4 2

# Goal 5: Technology

GOAL OUTCOMES	ACTIONS	PRIORITY
Complete set of technology systems that are all compatible	1 Develop an IT Strategic Plan with stakeholder engagement to assess all systems, levels of support, training, and policies. Use these results to prioritize organizational IT improvements 2 Replace or re-platform Document Locator (DocLoc) 3 Develop internal use policies and training for all technology systems and create a system of accountability 4 Streamline documentation processes for the RMCs 5 Create system and process training and onboarding program (CRM) 6 Improve the claims submittal process 7 Evaluate and improve the use of Neogov for HR processes and policies 8 Standardize and optimize the productivity suite (Teams) 9 Define application lifecycle strategy (build vs. buy assessment) 10 Discovery and phased modernization of Compass and Atlas platforms 11 Data and reporting modernization initiative	1 3 4 2 4 3 3 2 3 4 4
Employees that are trained and supported on IT Systems	12 Formal training for the whole organization on an internal communication platform 13 Formal training on Neogov for all employees 14 Establish AI Policy and usage program 15 Create system and process training and onboarding program	4 1 1 3
Supported IT Systems	16 Build IT support with stakeholder engagement to include IT management and development to oversee communications, system-wide updates, training, and investment in new technology 17 Evaluate the use of Covenant for internal IT support 18 Distinguish the development team from help desk support and build awareness around IT roles and support 19 Establish IT Governance and intake management structure 20 Establish formal cybersecurity program 21 Implement vendor management and contract oversight framework	5 1 2 2 2

# Goal 5: Technology

GOAL OUTCOMES	ACTIONS	PRIORITY
Streamlined member web experience	22 Implement a single sign-on option to improve Member experience	1
	23 Improve Member web experience and accessibility	4
	24 Improve the member statement experience and accessibility	2

# Implementation

## Implementing the Plan

The strategic plan was developed to be a living document that evolves to meet the needs of a changing organization. The following recommendations for implementation are based on experience and best practices in strategic plan implementation.

## Implementation Goals

- Provide two-way communication with the Board of Trustees and organization regarding updates, challenges and progress on goals and action items;
- Keep the strategic plan goals and actions updated and relevant;
- Sustain engagement and support for the plan through regular communication on emerging issues; and,
- Foster accountability for implementation across the organization.

## Strategic Plan Reporting

At each Quarterly Board Meeting the Executive Director will distribute a progress report sharing implementation highlights, challenges, opportunities, and other data. These reports will be shared with the Board of Trustees and the organization to communicate the strategic plan implementation snapshot.

Annually, a report will be distributed sharing the progress highlights from the year and updates for the following year. The updates may include changes to actions, priorities, and timelines based on the current environment and member needs. CIS Trustees, staff, and members can suggest annual changes for Board consideration. The annual updates will be approved by the Board at their 4th Quarter Meeting.

## Roles + Responsibilities

There are many stakeholders who play key roles in the successful implementation of the strategic plan. The roles are defined below:

### The Board of Trustees

CIS Board of Trustees administers the CIS Trust and represents CIS' members across the State of Oregon. They oversee the implementation of the strategic plan by providing direction to staff and supporting policies that are aligned with the mission, vision, values, and goals outlined in the plan.

## **Goal/Outcome Lead**

A member of the Executive Team who receives quarterly status updates, monitors timelines and resource needs as applicable, ensures alignment of the project with goal outcomes, and supports the Action Lead. Success means helping shape the movement of the goal without getting into the weeds of implementation, and removing barriers and challenges for the Action Lead.

## **Action Lead**

A CIS staff member assigned by the Executive Director who oversees implementation of the action, prepares the charter for the action/project, identifies and directs the project team as needed, develops Key Performance Indicators (KPIs), develops quarterly status reports, and maintains regular communication with the Goal/Outcome Lead. Success means keeping project momentum, supporting the project team, and ensuring the project team and Goal/Outcome Lead are informed.

## **Action Team Participants**

CIS staff members whose responsibilities may vary depending on the team member and may include completing implementation of the action or serving as advisor on implementation. Specific responsibilities for each team participant should be clarified in the charter. Success means carrying forward implementation and providing expertise and perspective.

## **CIS Staff**

CIS staff should be familiar with the mission, vision, values, and goals of the organization. Each staff member will be evaluated on how they incorporate the organization's values in their work. Some staff members may be included on project teams to work on specific actions in the plan. Staff will receive quarterly and annual reports on plan progress. During the annual reporting progress, the project leads will engage the organization to gather input on the overall plan and suggestions for updates.



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