

## 2014 Career Development - Six Step Plan of Work



Director:	Sara Kantor	SaraKantor@me.com
Vice:	Nitya Malik-Das	Nitya.Malik-Das@jnba.com

### Committee Members:

Mark Brice	Ellen Fee	Ellan Krubsack	Megan Olson
Molly Sullivan			

### FOSTERING TRUST

We will foster trust by...

- Open and honest communication
- Shared responsibility
- Accountability to each other and to our vision

### CREATING VISION

Our vision is to...

- Provide members, students, career changers and those new to the profession with opportunities to enhance their careers and deepen their involvement in our profession by creating a pipeline between generations and career stages.
- For 2014, the focus will be on increasing student involvement, establishing connections with those new to the profession/career changers, increasing collaboration with NexGen and promotion of the national mentorship program.

### DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors
<b>Successful Career Day</b> - An annual, day-long event designed to help individuals explore career opportunities in financial planning and facilitate the interview process between financial planning students/career changers and Minnesota FPA financial planning professionals.	2/28/14	Sara/Molly; Nitya/Megan	Attendance of students/career changers; participation of employers; promotion to area colleges and universities
<b>Promote Scholarship Programs</b> - Scholarships are available to encourage students and FPA members to learn and grow in the financial planning field, and to attain and enhance their CFP® designation. Montgomery Scholarships, Residency Scholarships, Symposium scholarships available.	Montgomery applications due 12/31/13; Residency Scholarship applications due 5/31/2014; Symposium Scholarship applications due 9/2014.	Committee	Promotion of scholarship opportunities; increased number of applicants

<b>Host FPA Symposium breakout sessions</b> – in conjunction with NexGen, host 2-3 sessions at FPA MN Symposium in 2014. Sessions designed for attendees newer to financial planning or topics that connect NexGen audience with other attendees. Facilitate Symposium buddy system that matches each student/new to profession attendee with one FPA member during Symposium.	10/20/14 and 10/21/14	Committee	Engaging speakers for Symposium; increasing attendance at Symposium sessions; securing buddies for Scholarship attendees
<b>Continue Relationship with FPA Student Chapter and Focus on Student Outreach</b> - Continue to develop connection with UM - Duluth Student Chapter. Make personal connections with other colleges/universities that have students who may wish to start their own FPA Student Chapter.	Ongoing	Committee; Nitya/ Megan - Duluth	Continuing support of UMD student chapter; making contact with area college/university advisors and professors
<b>Continue Developing Relationship with MN NexGen</b> by collaborating on Symposium, Career Day	Ongoing	Committee; Mark as liaison	Shared initiatives and events
<b>Bring Visibility to National Mentorship Program</b> - Support/participate in national FPA mentorship program (MentorMatch) through FPA Connect; encourage mentee participation at local level.	Ongoing	Committee; Mark (currently mentor)	Promote MentorMatch to FPA chapter; recognition of mentors/mentees in newsletter, at meetings

### ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
<b>FPA Committees: NexGen, PR Committee, Membership Committee, Symposium Committee</b>	Collaboration with other FPA Committees to plan and promote Career Development initiatives	Increased involvement, increased membership, increased attendance
<b>Area Colleges and Universities</b>	Connect with professors, advisors, students to build awareness of FPA, FPA student chapters, Career Day, Symposium, scholarship opportunities	Connection with professional organization to help transition from student to financial planning professional

### ACTIVATING TRANSFORMATIONS

- Frequent and scheduled communication with Committee members
- Use of FPA Connect and Committee Google account
- Monthly in-person meetings; regular reports of task progress from Committee members
- Document and post to FPA Connect and Google Drive all documents related to Career Day, Symposium, Scholarships to allow all members access and ability to work on Committee tasks

## MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION

Strategy	Monthly Report of Achieved Progress	Current Action Item(s)	Person Responsible (Alliances?)	Deadline for Action
<p><b>Career Day</b></p> <ul style="list-style-type: none"> <li>• Promote through contacting students, professors, advisors via email, visits, mailing</li> <li>• Target 90% attendance for registered students; require \$10 deposit</li> <li>• Target minimum of 40 student/career changer attendees and 8 employer interviewers</li> <li>• Develop timeline to follow in future years; document procedure for future years</li> <li>• Distribute survey for students/career-changers to gauge what can be improved upon for the following year and to find how many employers made job offers and hired (however, goal is NOT getting jobs)</li> </ul>	<p>Article in March newsletter after Career Day</p>	<ul style="list-style-type: none"> <li>• Contact schools</li> <li>• Contact students</li> <li>• Contact employers</li> <li>• Visit schools</li> <li>• Promote in newsletter, at FPA meetings</li> <li>• Secure panelists and speakers</li> <li>• Secure FPA volunteers</li> <li>• Define Roundtable topics</li> <li>• Promote with PR Committee</li> </ul>	<p>Career Development Committee, PR Committee, NexGen</p>	<p>Send emails: Week 2 of Dec; Week 3 of Jan; Week 1 of Feb</p> <p>Visit/mailings to schools: end of Jan/ beginning Feb</p> <p>Newsletter Jan, Feb</p> <p>Meeting announcement Jan, Feb</p> <p>Speakers by Jan 31</p> <p>Volunteers by Feb 10</p> <p>Students by Feb 14</p> <p>Attend PR Committee Mtg</p>
<p><b>Scholarships</b></p> <ul style="list-style-type: none"> <li>• Promote through FPA newsletter, at chapter meetings, mailings to MN colleges and universities</li> <li>• Discuss scholarships for non-undergraduate applicants with Board</li> <li>• Goals of at least 15 student applicants &amp; 5 new to profession/career changer applicants for 2014 Symposium scholarships; at least 3 member applicants for the Montgomery Scholarship; at least 2 applicants for the Residency Scholarship</li> </ul>	<p>Article in newsletter after Scholarship recipients are named</p>	<ul style="list-style-type: none"> <li>• Mailings or visits to MN campuses</li> <li>• Board agenda item</li> <li>• Better promotion of scholarships to students</li> </ul>	<p>Career Development Committee, PR Committee, NexGen</p>	<p>Mailings/visits: end of Jan/beginning Feb</p> <p>Board meeting</p> <p>As scholarship deadlines approach</p>
<p><b>Symposium</b></p> <ul style="list-style-type: none"> <li>• Develop a program that attracts at least 15 student attendees</li> <li>• Have an FPA member connection for each student/ career changer/new to profession attendee</li> </ul>	<p>Article in newsletter after Symposium</p>	<ul style="list-style-type: none"> <li>• Plan session aimed at NexGen attendees or visits to MN campuses</li> </ul>	<p>Career Development Committee, Symposium Committee, NexGen</p>	<p>Sept-Oct 2014</p>

<p><b>UM-Duluth Student Chapter and other potential student chapters</b></p> <ul style="list-style-type: none"> <li>• Make at least one trip to Duluth in 2014</li> <li>• Meet club/organization contacts at MN colleges and universities to introduce FPA Student Chapter possibility</li> </ul>	<p>Communicate with Membership Committee, NexGen for new members</p>	<ul style="list-style-type: none"> <li>• Mailings or visits to MN campuses</li> <li>• More frequent email contact with college &amp; university professors &amp; advisors</li> </ul>	<p>Career Development Committee, NexGen, college/university professors &amp; advisors</p>	<p>Ongoing</p>
<p><b>Mentorship</b></p> <ul style="list-style-type: none"> <li>• Promote MentorMatch with assistance from FPA national</li> <li>• Have mentor/mentee write article for newsletter about their experiences</li> </ul>	<p>Article in newsletter</p>	<ul style="list-style-type: none"> <li>• Mailings or visits to MN campuses</li> </ul>	<p>Career Development Committee, Membership Committee, FPA national</p>	<p>Ongoing</p>
<p><b>NexGen Relationship</b></p> <ul style="list-style-type: none"> <li>• Career Day</li> <li>• Symposium break-out sessions</li> <li>• Other events as determined</li> </ul>		<ul style="list-style-type: none"> <li>• NexGen volunteers for Career Day</li> <li>• Together identify Symposium speakers for joint collaboration</li> </ul>	<p>Career Development Committee, NexGen</p>	<p>Ongoing</p>