

2014 Membership - Six Step Plan of Work



Director:	Kathie Bortnem	kabortnem@milesfranklin.com
Vice:	Chad Halbur	Chalbur@Cornerstonetrust.net

Committee Members:

Brad Barinsky	Craig Dahl	Brad Frane	Joel Johnson
John O'Keefe	Patrick Redman		

FOSTERING TRUST

We will foster trust by...

- Using open communication to help energize and integrate strategies, be action-oriented when implementing them and be accountable to the public, our members and the community.
- Empowering committee members with specific responsibilities and monitor accountability on an ongoing basis.
- Projecting enthusiasm, passion and excitement. Having regular in person meetings. Spending time getting to know each other personally.
- Sticking to a working plan.

CREATING VISION

Our vision is to...

To be responsible for the recruitment of new members and for the integration of new members during the first year of membership so they continue on as engaged and active members.

Proactively and effectively communicate the benefits of FPA membership to the Minnesota financial planning community and our own members, with the intent to increase membership.

DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors
Proactively and effectively communicate the benefits of FPA membership to the Minnesota financial planning community with the intent to increase membership	January 1	Chair	Incorporate Roadmap to Success
	Monthly	Chair	Work with committee members to allocate duties
Committee Growth	Ongoing	All committee members	Proactively invite chapter members to join committee

Energize Committee Members	Monthly	Chair	Identify strengths of committee members. Recognize active committee members and non committee members who foster growth of our chapter.
Hold Committee Meetings	TBD	Chair	Schedule monthly meetings
<u>Membership Growth:</u> Goal-105 New Members Stretch Goal-115 New Members 2013 Benchmark: 832 members on 12/31/13 2012 Benchmark: 817 total members on 12/31/12 New member counts: 2013: 110 new mbrs 2012: 106 new mbrs 2011: 92 new mbrs 2010: 92 new mbrs 2009: 74 new mbrs 2008: 114 new mbrs 2007: 97 new mbrs 2006: 123 new mbrs 2005: 100 new mbrs	Ongoing	All committee members	Staff membership table, meet and greet new members and guests.
	Ongoing	All committee member	Promote Member-Get-A-Member Campaign-details are in progress
	Monthly	Monthly Assignments	Call first-time attendees from each chapter meeting
	Ongoing	Chair Coordinates	Respond to emails/calls from potential members regarding membership
	4 Events	All committee members	Host New Member Social
	October 2014	Chair to coordinate	Promote membership at Symposium.
	Ongoing	TBD	Establish consistent presence at CFP exams; reach out to CFP's for membership.
	Ongoing	TBD	Reach out to schools and work with NexGen to bring in a new generation of financial professionals
	Ongoing	TBD	

ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
Current Members	New member referrals	Opportunity to help chapter grow by Mentoring new members
FPA National	New membership ideas, updates from nationals, etc.	Continued growth of profession and MN Chapter
Member Services Committee	To work closely with them to insure the entire FPA experience is positive.	New members that are active in the chapter in the first year so they remain active.
Career Development	New CFP's and new members	Encourage new professionals to join
Symposium	Add new members before Symposium and at Symposium	Continued expansion of local chapter

ACTIVATING TRANSFORMATIONS

- Committee members will share ideas for how to grow the membership and take responsibility for executing the task they believe suits them best
- Monthly statistics will be evaluated for meeting established goals
- Committee member participation throughout the year will be key to a successful outcome

MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION

Strategy	Monthly Report of Achieved Progress	Current Action Item(s)	Person Responsible (Alliances?)	Deadline for Action
Promote Mentor program		Establish clear communication with current member on how the program works	Entire committee	February 2014
Recruit CFP's for membership		Committee will determine how and who	TBD	In progress
Develop relationship with Business schools and NexGen		Meet with NexGen director and identify schools	TBD	In progress