

2014 Symposium - Six Step Plan of Work



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Committee Members:

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FOSTERING TRUST

We will foster trust by...

- Inviting open communications from the board, committee members and the entire FPA MN membership.
- Clear understanding of the committee member roles, expectations and responsibilities. The Symposium committee agrees on a common vision and strategy.
- Commitment to carry out expectations of attendees of the Symposium event with good, high quality leadership from our committee members.
- Foster meaningful relationships between committee members. Although the strengths and interests of each individual committee member may vary, all members are expected to demonstrate their leadership to support the mission of this committee and the FPA of MN.
- Be lighthearted, open minded and make sure to have fun!

CREATING VISION

Our vision is to...

- Fosters competent, committed and ethical members
- Provides education enrichment and a networking opportunity for attendees
- Assists members in achieving professional growth and personal fulfillment, including membership retention and new member recruitment
- Forges alliances with other FPA MN committees, partners, members, and others serving the financial services community (lawyers, accountants, insurance professionals, mortgage consultants, etc.)
- To provide educational enrichment and foster relationships with our members that will enhance their personal and professional growth.

DEVELOPING STRATEGY

Strategy	Target Date	Committee Member(s) Spearheading	Critical Success Factors
Secure Symposium event dates and venue	July of the previous year	Executive Director and Symposium Director	Capacity of facility, cost effective, food quality, attendee access, parking, location
Establish monthly meeting date, time, and place	January 1 st	Symposium Director	Agreement of all committee members, usually 1st Tuesday
Finalize Plan of Work and annual budget	January 1 st	Symposium Director and	Agreement on strategies and

		Committee	profitable event
Finalize main room and breakout speakers	March 1 st	Entire Committee	Cutting edge to increase attendees consistently every year
Create agenda syllabus - topics and presenters.	February 28 th	Entire Committee	Previous year's evaluations, other Symposium agendas, "hot topics"
Assign handler for each presenter	March 31 st	Entire Committee and Symposium Director	Costs, sponsorship, CE credits, ensure timelines are met, newsletter article
Symposium Promotion and Marketing	July 31 st and throughout year Social Media: 4/1 Postcard: 7/1 All marketing: All year	Entire Committee	PR Committee, Partner Committee, large company solicitation, periodicals, phone-a-thon, monthly chapter meetings, newsletter articles
Secure CE Credits	July 31 st	Executive Director	CFP, MNCE, WICE, CPE, CLE, CIMA, CFA, and CDFA - up to 14 CEs
Prepare for actual event: handouts, set up, logistics, technology, exhibit hall	October 13, 2013	Entire Committee and Volunteers	Positive, glowing evaluations
Review partner and attendee evaluation forms	December	Entire Committee	Top 10 topical areas of interest, solicit speakers, budgetary considerations, and topic ideas
Recruit new committee members and volunteers	Ongoing throughout the year	Entire Committee, Director, and Board	Placards at monthly meetings, newsletter articles and solicitation, proactive recruitment. Symposium registration complimentary. Goal is to maintain 10 active members
Be ever aware of "hot" new topics	Ongoing	Entire Committee	Read, read, read! Social media (Twitter, Facebook, LinkedIn, Google, etc.)
Communicate with potential speakers who seek out FPA of MN	Ongoing	Entire Committee	Great line up for next year

ENERGIZING ALLIANCES

Alliance	What do we want?	What do they want?
Partnership Committee	Solicit partners to sponsor a booth in Exhibit Hall at Symposium. Solicit partners to host breakfast, lunch, 1st day	Happy Partners coming back year after year

	reception, snacks/beverages during breaks, attendee promotional giveaways, educational forum and networking.	
Public Relations Committee	Promotion of Symposium - advertising ideas and considerations, take pictures at the event. Use of social media for advertisements.	News that excites the media; increased followers; increased coverage
Membership Committee	Booth at the event to promote FPA MN to attract at least 12 new members	New and satisfied members
Programs Director Programs Committee	Coordination of program content of monthly meetings and possible synergy with Symposium. Regular, ongoing communication to share ideas about what has worked at monthly meetings - hot topics, attendee evaluations	Happy members; increased new members, increased retained members
Career Development Committee	Present “financial essentials” program(s). Invite 20 scholarship applicants to Symposium. Have students help with eval pickup or other as-needed items (ie - technology, etc.)	Involvement of NexGen and career changers; open mic for concerns; 20 students and increased student membership and participation

ACTIVATING TRANSFORMATIONS

- We will better communicate our Plan of Work to continue to grow our committee.

MEASURING PROGRESS, ACHIEVING RESULTS AND RESETTING THE VISION

Strategy	Monthly Report of Achieved Progress	Current Action Item(s)	Person Responsible (Alliances?)	Deadline for Action
Successful Symposium event	2013 presenter average – 3.494 2012 presenter average – 3.492 2011 presenter average - 3.54 2013 attendance - 577 2012 attendance - 558 2011 attendance - 497	Seek to increase presenter ratings and increase attendance at event	Entire Committee	
Budget overall event; registration rates; and partnership offerings	Top-notch speakers confirmed, increased registrations, making for a profitable event	Control cost of speakers, utilize sponsors. Competitive, comparable registration rates, conservative event costs (rent, food, etc.)	Director and Executive Director	

Partner support and feedback	Evaluation commentary from 45 partners All additional sponsor slots (breakfast, lunch, etc.) filled	Positive evaluations from partners who exhibit Fill up extra sponsorship slots by July 31st	Director and Partnerships Director	
Registration - members vs. non-members	Strong program to consistently hit 33% attendees as non-mbrs; work with Membership to convert to members	Increase member and non-member registration	Entire Committee and Entire Board	
Partnership Sponsors		Have partners elect to provide support: Newsletters, media/social media, meetings, partners/allies	Director and Partnerships	
Speaker Costs	\$30,850	Negotiate speaker fees; keep travel costs down; find local speakers when possible	Entire Committee	