

Membership Committee Plan of Work

Fostering Trust: We will foster trust amongst the group by communicating clearly, setting expectations, holding members accountable and expecting excellence from each other.

Vision: We are the most sought after organization for like minded professionals who support every aspect of the Financial Planning Process.

Mission: To recruit, retain and develop exceptional planning practitioners **and likeminded allied professionals** to further our industry.

Critical Success Factors:

Recruit

Students Sharif Small

CFP Paul Terry

Practitioners

FA-Dave Forman

Insurance-TBD

Attorney- Jason Abosch

CPA-Sharif Small and Jason Abosch

Mortgage-TBD

Retain

Students Sharif Small

CFP Paul Terry

Practitioners

FA-Dave Forman

Insurance-TBD

Attorney- Jason Abosch

CPA-Sharif Small and Jason Abosch

Mortgage-TBD

Develop-work with event committee to provide value added content

Allies

Internal

Programs committee

Partners

Members

FPA Board

External

Partners

AMP

Branch Managers from local firms

Activating Transformations

Changes that need to be made

- New members to the committee to make outreach

- Better delivery of value proposition

Team Changes

- New leadership

Organizational Practices

- New Member breakfast

- Ambassador program

Achieving and Measuring results

- Recruit 45 new members

- Retain 85% of existing members

2011 PLAN OF WORK

Government Relations Committee

Leadership Principles Template

FOSTERING TRUST: What do I need to do to foster trust with other people (internally and externally) who can help me be successful?

1. Responsiveness
2. Complete requested and promised tasks
3. Delegate committee activities to grow active committee members and develop future leaders
4. Communicate with Board and other committees
5. Adapt to the many different communication styles of committee and Board members.

VISION: What is our shared vision for our committee and what is the general objective we seek to achieve? The vision deals with external things of what end and for whom.

The government relations committee monitors and reports to Maryland chapter members regarding federal and state legislative initiatives and supports the national office government relations efforts, as well as fostering the partnership of legislative efforts between the legislators and the Chapter.

MISSION: What actions will be taken by the committee? The focus is on internal things. The statement uses verbs and describes actions that will be taken.

- Facilitate the exchange of federal and state legislative initiatives which will further the professional development of Maryland chapter members and expand awareness of governmental activity.
- Advocate on behalf of the Maryland chapter through continuing to develop and foster political and regulatory relationships.
- Promote the financial planning profession to federal and state legislators.

DEVELOPING STRATEGY: What is our strategy for achieving our vision?

Critical Success factors: What are the most essential tasks that need to be performed to achieve our vision? Who is assigned to successfully complete each part of the work?

Factor	Who is assigned
Annapolis legislative event	Crystal Cooper
Participate in programs to report on National Office monthly Capitol Updates	Craig Berman – all members
Liason with public relations committee	Steve Berger
FPA-PAC	All members
Communicate with political contacts	All members
Maryland Chamber of Commerce	Adam Freeland
New Member Breakfast attendance	All members when available by geographic proximity to breakfast
Governor/Public Recognition of Financial Planning Week and FPA efforts	All Members

Identifying Our Allies: Who are potential allies within the FPA as well as outside the FPA, who can help us successfully achieve our vision and carry out our strategy?

Internal Allies	What do we want?
Mike Curley	Guidance Support for GRC Agenda
Other Committee Chairs	Support
Other Board Members	Guidance - support
William Bissett	Guidance - support
External Allies	What do we want?
Dan Barry/Jennifer Rudolph/Phillips Hinch – FPA National	Guidance with Federal legislative issues – support our initiatives
Legislators	Legislative outreach
Karen Syrylo (MD Chamber Tax Consultant) and Melanie Lubin (MD Securities Commissioner)	Guidance with MD issues - outreach

ENERGIZING ALLIANCES: What do we want (see above) and need from our allies to achieve our vision and carry out our strategy? **What do they want and need from us?** Who will be assigned to structure and maintain the relationship with each alliance?

Ally	What do they want?	Who assigned
Karen Syrylo/Melanie Lubin	Our support and forum	Adam Freeland
Mike Curley	A developed GR committee	Committee Chair
Board Members	A developed GR committee	Committee Chair
Legislators	Our support and forum	All members
Dan Barry/Jennifer Rudolph/ Phillips Hinch	Continued Activity	Craig Berman
Other committee members	Support and information	All members
Public Relations Committee	Awareness	Steve Berger
Senator Robey	Annapolis Day	Crystal Cooper and Rebecca Altman
Christine Parker, Howard Pressman FPA DC Chapter	Inclusion and cooperation with Annapolis Event	Crystal Cooper and Rebecca Altman

ACTIVATING TRANSFORMATIONS: What individual, team or organizational practices need to be changed to successfully carry out our strategy and achieve our vision? Consider: time management, personal communication skills, team communication methods, and improved teamwork and cooperation.

Individual Changes You Need to Make

1. Engage committee members to accept roles for committee work
2. Encourage communication between our committee and other committees
3. Continue to recruit new members

Team Changes

1. Encourage active participation through individual and committee contact
2. Delegate assignments and tasks so that all members are actively involved
3. Succession of the Chair.

Organizational Practices

1. Encourage communication between our committee and Board/other committees.

ACHIEVING AND MEASURING RESULTS: Establish a measuring program to ensure that we will measure both progress and results. Create a schedule where we receive reports about individual progress and about our progress in fulfilling critical success factors and developing productive allies.

Measuring progress: meeting schedule and reports

Critical Success Factors	Who Reports & When
Recruit members	Committee Chair/conference calls
Update on Legislative issues	All members/CE meetings
Annapolis event	Crystal Cooper/Rebecca Altman conference calls
Developing and fostering political & legislative relationships	All members/committee calls
Supporting National office	Craig Berman/committee calls
Maryland Chamber of Commerce	Adam Freeland
Public Relations Liason	Steve Berger

Results: Schedule reports about our results. What results do we want to measure and when?

Alliances	Who Reports & When
Board/committee member allies	For all alliances, the committee should report these during our conference calls
Karen Syrylo/Melanie Lubin	Adam Freeland - conference calls
Dan Barry/Jennifer Rudolph	Craig Berman - conference calls
Legislators	All Members
Senator Robey	Crystal Cooper - conference calls
Public Relations Committee	Steve Berger - conference calls
Financial Literacy Initiatives - -CFP Development	Susan Mitcheltree - conference calls

Program Committee

1. Foster Trust
 - a. Communicate clearly, set expectations, deliver on commitments and expect the same from others.
 - b. Provide accountability among others within our committee
 2. Vision
 - a. Foster professional knowledge and growth by offering continuing education, skills training and social gatherings.
 - b. Events should be well attended, energized and revenue positive.
 - c. Utilize partners to proactively promote attendance
 3. Mission
 - a. Create schedule of events and identify event chair for each
 - b. Develop list of potential topics and speakers
 - c. Address members' need for CE, CFP, CPE
 - d. Determine means of improving attendance
 - e. Seek methods of holding positive net revenue meetings
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Developing Strategy

1. Format: Each Event has a Chairperson in charge with a program committee person providing assistance and or oversight
2. Meeting Coordination: Program committee member works with event chair, executive director and other committees to facilitate promotion and execution
3. Speaker Selection: all have input
4. Analyzing Member Feedback: Event leader, Program Committee & Director

Identifying Our Allies

Internal: former board members, partners, other committees, board, Exec. Director

External: FPA/Denver & DC; elected officials

Energizing Alliances

1. Director; wants strong attendance; Prog. Chair is assigned
 2. Board; same; same
 3. Comm. Chairs; want events to reflect their goals; Prog. Chair
 4. Speakers; want exposure, relationship building, biz development; committee
 5. Partners; want biz growth, exposure, promotion; Prog. & Event Chair
 6. Past Pres., Board, Comm. Members: may want to chair an event; Prog. Chair
 7. Communications Comm.; want material to promote; Event Chair
 8. Event Sites: want revenue; Exec. Director
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Activating Transformations

Individual: Program Chair communicates regularly with Communication Chair & Partner Chair to help promote events.

Team Changes: add members to committee

Organizational practices: keep monthly call to evaluate meeting via the survey monkey

Achieving & Measuring Results

Continue survey monkey & monthly program committee conference call.

Compare quality and attendance from prior year survey monkey

2011 Plan of Work

Public Relations Committee

FOSTERING TRUST:

We can best foster trust by communicating clearly for the FPA, setting reasonable expectations and following through on our plan of work. Rebuilding the committee so that we can effectively communicate in 2011.

VISION:

An efficient organization that facilitates communication of relevant, timely, quality, concise information on financial planning from chapter members and partners to media and public.

MISSION:

Gather and provide relevant, timely, quality, concise information promoting financial planning to media and public.

DEVELOPING STRATEGY:

Factor	Who is assigned
Assign sub-committee members for each media outlet	Committee chair
Gathering info from other committees	Committee liaisons
Gathering info from Board via CEO	Committee chair
Gathering info from chapter members via quarterly email surveys	Mike Curley and assigned committee member (rotate quarterly)
Provide info via print, radio, TV, and social media mediums.	Sub-committee chairs
Provide info to non-profits for them to distribute. Create goodwill within community.	Elizabeth Reed

Recruiting for sub-committee members will be a critical success factor in 2011. Building a strong team for the upcoming year will require dedicated individuals.

IDENTIFYING OUR ALLIES:

Internal Allies	What do we want?
Board members	Source of info
Chapter members	More members for committee. Source of info
Committees	Information and ways to combine our efforts
Director	Source of info
Partners	Source of info
External Allies	What do we want?
Non-profit organizations	Media contacts, goodwill building and resources
Media outlets	Distribution channel
FPA National	Resources, expertise, interview opportunities

ENERGIZING ALLIANCES:

Ally	What do they want?	Who assigned
Non-Profit Groups	Expertise. Information.	Elizabeth Reed
Media: Social networks	Members and content	Social media sub-committee chair
Media: radio	Interesting PSAs, event info	Radio sub-committee chair
Media: print	Timely stories, easy access to interviews, information for fill space	Print sub-committee chair
Media: TV	Information, stories/events, interviews	TV sub-committee chair
Board members	Feedback, promotion	PR Chair
Chapter members	Information, promotion, interviews	Director
Committees	Promotion	Committee Liaisons
PR Specialists/Volunteers	Exposure to potential members	Various sub-committees
FPA National	Chapter information	PR Chair

ACTIVATING TRANSFORMATIONS:

Individual Changes You Need to Make

Team Changes

- Rebuild and strengthen committee so we can follow through on action items included in our 2011 plan including assigning sub-committee chairs
- Recruit an additional 4-6 committee members
- Identify and target a media list through building contacts. Set a goal of developing one good relationship within each media group (TV, radio...).
- Recruit PR expert to volunteer
- Assign PR committee liaisons to foster more effective communication with other FPA committees.
- Develop relationships with non-profit organizations that can help us promote the FPA through their existing channels.

ACHIEVING AND MEASURING RESULTS:

Critical Success Factors	Who Reports & When
Rebuild PR Committee & Recruit sub-committee chairs	Members report to chair. Ongoing through 2011. We will need at least 4-6 active committee members.
Promote significant chapter member events/awards	Chair emails director to promote internally first
Create 2011 calendar/timeline	Who: Committee Due: Develop during December 2010 GoToMeeting
Strengthen our non-profit contacts	Elizabeth Reed and other members as needed. Monthly.

Results:

Alliances	Who Reports & When
Develop personal media relationships	Media sub-committees reports at monthly committee meeting
Develop inter-committee communication	Committee liaisons report at monthly committee meeting
FPA MD Board	Chair reports before each board meeting
Develop chapter members information	Director emails quarterly survey results
Non-profit organizations	Elizabeth Reed. Monthly as needed.

The public relations committee must create a strong foundation early in 2011. The events of 2010 exposed a glaring weakness; a lack of a strong succession plan. Leading up to and continuing into 2011, the PR committee must work on creating a “repeatable process”. The PR committee chair with assistance from a co-chair (ideally the chair for the following year) should work on developing:

1. A list of required activities (broken down to weekly, monthly, quarterly and annually recurring items...(i.e. quarterly survey followed by a press release, monthly PR committee calls, monthly chair and co-chair calls to prep for PR committee calls, quarterly FPA National PR calls...).
2. A list of resources available to the committee chair, co-chair and sub-committee chairs (i.e. FPA National support, FPA data banks, templates for press releases and reports...).
3. Basic agenda for all monthly calls to create a formal or informal (as desired) structure.
4. Websites, e-mail addresses, passwords, etc. for PR related activities (i.e. sub-committee e-mail addresses, document banks, etc.).
5. An annual calendar with a planned transitional period for the co-chair.
6. A training program for active PR committee members.
7.

Create a consistent and repeatable process; a “plug and play” type of model that allows less experienced individuals to easily learn the system.