



2018 SYMPOSIUM COMMITTEE - Plan of Work

**FPA is the community that fosters the value of financial planning, and advances the practice and profession of financial planning.**





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| Director:  | Nick Augustin | director@fpamnsymposium.org |
| Vice:  |  |  |

 Committee Members:

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| Bonnie Stanley | Charles Buck | Jeffrey Drayton | Craig Jergenson |
| Art Lundgren | Ron Caverly | Julieann Schroeder | Kim DeBaere |
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**PASSION STATEMENT**

**Passion statements are like a mission statement for your committee.
These are put on the committee page of the FPA MN website.**

We will help fulfill the FPA of MN mission by creating an event that fosters competent, committed and ethical members, provides educational enrichment and networking opportunities, assists members in achieving professional growth and personal fulfillment and provide support to other FPA MN committees to better help the financial service community as a whole.

**3 MAIN STRATEGIES
As a guide, strategies are not specific projects.**

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| **Strategy 1** | Building an attractive conference agenda at an attractive price point |
| How will we communicate with our targeted audiences? | As a committee, we will brainstorm speakers and speaker topics based on evaluation forms received from past attendees, speaker reviews or speaker suggestions from other financial planning conferences, and topics of emerging importance to our profession |

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| **Tactics to Fulfill Strategy** | Target Date | Committee Member(s)Spearheading | Value that should be Communicated. |
| Maintain call-to-speaker submittals and speaker lists for consideration.  | Ongoing | All committee members | Maintaining quality presenter options.  |
| Brainstorm quality local speaker options for cost efficiency, particularly for breakout sessions. | Ongoing | All committee members |  |

**Ways to Integrate Ideas and Collaborate
How does what you do integrate with what other committees/organizations do?**

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| --- | --- | --- |
| Alliance | What can we provide? | What can they provide? |
| Programs | Speaker ideas/topic coordination | Same |
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| **Strategy 2** | Market conference to target audiences |
| How will we communicate with our targeted audiences? | We will continue social media postings while leveraging the skillset of the PR committee that encompass the speaker’s social media handles, reach out via phone to inconsistent attendees, & continue successful mail campaigns and promo codes.  |

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| Tactics to Fulfill Strategy | Target Date | Committee Member(s)Spearheading | Value that should be Communicated. |
| Connect with PR committee to provide important registration dates, speaker names, and handles for social media promotion. | March 2018 | Nick | The importance of Symposium to the Chapter |
| Continue use of Speaker Media Kit, improve usage of it. | June 2018 | All members | The value of Symposium to our speakers, promoting their talents and skillsets to their target audiences. |
| Agenda mailer and reminder with promo code. | June, July 2018 | Bonnie, all members. |  |

 **Ways to Integrate Ideas and Collaborate
How does what you do integrate with what other committees/organizations do?**

|  |  |  |
| --- | --- | --- |
| Alliance | What can we provide? | What can they provide? |
| PR | Speaker names, social media handles, important registration deadlines. | Expert and consistent social media pushes. |
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| **Strategy 3** | Strengthen the committee for the future |
| How will we communicate with our targeted audiences? | Symposium is an extremely important event for the entire chapter and its future success is dependent on active and passionate volunteers and leadership. |

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| Tactics to Fulfill Strategy | Target Date | Committee Member(s)Spearheading | Value that should be Communicated. |
| Increase committee members by at least two new members  | Winter 2018 | All committee members | We are a valuable resource; your input shapes the future education programming. |
| Identify our next Vice Chair/Director | 1/31/2018 | Nick, Rachel | Leadership succession is vital to the chapter and a great opportunity for the volunteer. |

**Ways to Integrate Ideas and Collaborate
How does what you do integrate with what other committees/organizations do?**

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| --- | --- | --- |
| Alliance | What can we provide? | What can they provide? |
| 2018 Board |  | Counseling, advise. |