



Setting a higher standard

Strategic Plan 2009

Mission (from 2007 two year Business Plan)

- To serve members
- To promote the CFA program and designation
 - Includes charterholders, candidates and employers

Outline

Using the business plan set out at the end of 2007 strategic planning session for the 2008-2009 period, the current market environment and its challenges has been taken into account to generate the plan for 2009. The aim of the 2009 strategic plan is to set realistic set of focussed objectives rather than a long laundry list, to meet the Society's mission. We propose the following broad strategic objectives for 2009:

1. Careers services for members
2. Communications review
3. Develop effective governance

1. Careers Services for Members

In light of the global financial crisis, there will be more members in need of our help. Now is the right time to step up and provide these services to our members when they will need it most. Suggested areas to add value are not limited to a mentoring program, soft skills workshops (resumes, interviews), continued networking opportunities, and also continuing to emphasize continuing education.

2. Communications Review

We communicate with our members using a number of mediums – emails, our web-site, and the newsletter. We also communicate indirectly via our public relations initiatives and at our seminars. It is time we looked at communications with members more holistically and strive to communicate with members more effectively with consistent branding and marketing. Our web-site, email formats/frequencies, and newsletter all need review.

3. Develop Governance

Outlining our new governance structure was the first step in improving the effectiveness of Board and Management (see minutes and papers of November 08 Board meeting). This year, we will strive to improve the efficiency of the Board, Management Oversight Committee, and Staff.

Please refer to the 2 year Business Objectives from end of 2007 that are attached to this document.