



Master Chapter Plan 2020–2021

FSP Chapter Leaders Web site: www.fspleadership.org

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Purpose

Core Values

Relationships / Education / Ethics

Purpose

The Society of Financial Service Professionals exists as a community of credentialed professionals whose common purpose is to ethically serve their clients. FSP's local Chapters and national society provide personal access to world-class resources and knowledge that help members build their professional networks, enhance their knowledge base, and grow their practices.

Mission Statement

FSP's mission is to promote professionalism among its members by:

- Cultivating mutually beneficial relationships among credentialed financial service professionals
- Delivering top-quality continuing educational programming
- Establishing the highest standard of ethical conduct

Goal

To help financial service professionals deliver the highest level of client service possible

Diversity Statement

The Society of Financial Service Professionals is committed to creating and nurturing an inclusive community for financial service professionals. We recognize that diversity of age, gender, ethnicity, and practice specialty will strengthen our ability to honor our core values of relationships, education, and ethics.

Chapter Plan Worksheet 2020-21

Chapter Core Competencies: *Leadership / Membership / Value Proposition*

Chapter Name: _____ **Chapter Year:** 7/1/20–6/30/21

Date of Planning Day: _____

- ☐ **Charge:** Deliver value to member community through collaborative opportunities, excellent programs and services. Insure continuity by member engagement, recruitment and leadership development.

☐ **Officers**

President:

President Elect:

Immed. Past Pres:

Secretary/Treasurer:

Directors:

☐ **Committee Chairs**

Membership:

Prof'l Development:

Nominating:

Other Committee Chairs:

☐ **Purpose**

Chapter Mission Statement:

Chapter Value Proposition:

☐ **Primary Goals**

1.

3.

2.

4.

☐ **Budget**

Revenue _____

Expense _____

Net _____

Chapter Planning Best Practices/Ideas

- ☐ Review Chapter bylaws for operating guidelines; review prior strategic plan/on-going projects.
- ☐ Ensure Board/Committee Chairs are versed in their responsibilities and organizational goals.
- ☐ Set annual calendar and due dates for Board/Committee activities by July 1.
- ☐ Track progress of Board/Committee activities throughout the year; follow up promptly on late/missed assignments.

Ideas for Chapter Planning

- ☐ The President should begin planning for the Chapter year in office from the first day as President Elect and throughout that year.
- ☐ The President Elect should work closely with the Nominating Committee as they will be selecting his or her leadership team.
- ☐ During his or her term of office, the President should be looking for leadership candidates because that will be his or her responsibility as Nominating Committee Chair.
- ☐ Debrief the leadership training with the new Board as soon as possible following the event. Set the date for the Planning Day. Make sure everyone going on to the new Board understands their roles and assignments and what they need to prepare for the meeting.
- ☐ The Planning Day should be a culmination of the planning process, not the beginning.
- ☐ Prior to Planning Day and the new Board assuming office, the President should meet with each Board member (over coffee, breakfast, etc.), get to know them, their business, their leadership style, their personal goals, and what they want from FSP.
- ☐ Prior to Planning Day, the President should meet with the officers and key committee chairs to discuss their goals and objectives—and how they fit in with the overall plan.
- ☐ Prior to Planning Day, the President should meet with the Chapter Exec to put together the agenda and materials needed for the session.
- ☐ At the Planning Day and subsequent Board meetings, the President is charged with making the best use of everyone's time, keeping to the agenda, making sure every voice is heard, and setting expectations for performance.
- ☐ Your volunteers work hard on behalf of the organization. Make Planning Day a fun event. After the business meeting, have an informal social time. Invite spouses/significant others.
- ☐ KEEP IT REAL. Recognize that volunteers have day jobs. Challenge goals are fine, but make sure the Chapter Plan is realistically within the capacities/capabilities of your group to execute with success. Cover core elements first—Leadership/Value Proposition/Membership; then add adjunct programs like Professionals Day.

Chapter Planning Assessment

☐ **SWOT**

Strengths:

Weaknesses:

Opportunities:

Threats:

☐ **Human Resources**

Total number of members:

Volunteers:

Administrative support:

☐ **Financial Resources**

Bank account balance:

Reserves:

Investments:

Financial statement

Sources of income

- Dues revenue:
- Non-dues revenue (sponsorships, meetings, etc.):

Expenses:

Budget

All Committee Chair budgets due to Treasurer: _____ (date)

Budget due for Planning Meeting: _____ (date)

Final Budget due for Board approval: _____ (date)

☐ **Resource Summary**

The Chapter has adequate financial and human resources necessary for us to fulfill member needs and satisfy our mission and purpose.

Yes ____ No ____ Comments/Areas to Address:

Chapter Goals & Strategies

BOD/Committee Chairs: Develop goals for their areas of responsibility and objectives/activities to attain the goals. Define how activities will attract, serve, and retain members.

☐ **Membership Development**

Set recruiting, retention, overall membership goals
Complete *Calculating Chapter Dues Worksheet*.

Recruitment: # of new members _____
Retention: # of members retained _____
Total: # of members as of 6/30/21 _____
Ensure diversity: Practice specialty/age/gender/ethnicity

☐ **Professional Development**

Complete *Professional Development Planning Worksheet*

Regularly scheduled chapter meetings: # ____ / frequency _____
Engage ____ / ____ numbers of members / prospects at each event
Engage ____ % of members at all meetings for the year
May also set goals for:
 Networking opportunities
 Signature large-scale event

☐ **Leadership Development**

Complete *Nominating Committee Planning Worksheet*.

Full slate of officers, directors, committee chairs for current year
Yes ____ No ____ Comments:

Candidates for future leadership service identified
Yes ____ No ____ Plan to engage them:

Goals for leadership diversity—Practice specialty/age/gender/ethnicity
Yes ____ No ____ Comments:

☐ **Nominating Committee**

The Nominating Committee is charged with identifying and developing leadership candidates for our Chapter throughout the year. We follow the nominating and election rules outlined in Article V of the Chapter bylaws to ensure we do not have any contested election of officers and board members.

Yes ____ No ____ Comments:

☐ **Sponsorship**

Financial needs requiring funding targets are identified.
Sponsors will be engaged for all monthly meetings.
Sponsorships will meet/exceed minimum budget requirements.

Yes ____ No ____ Comments:

Planning Day Process

Preparations

- ☐ Set Chapter Planning Day date/location: _____
- ☐ President, Treasurer, and Committee Chairs to prepare in advance:
 - Goals
 - Budgetary Requirements
 - Action plans including due dates and responsible parties
- ☐ Board meeting calendar established by: _____ (date)
- ☐ Our plan for new Board member orientation/transitioning of responsibilities includes:
 - Meeting with outgoing officer/chair
 - Meeting with Chapter Executive, as needed
 - Connecting with FSP National staff
 - Review of resources on the FSP Chapter Leaders website, www.fspleadership.org

At the Planning Day

- ☐ President chairs the event
 - Presenters include:
 - Secretary/Treasurer—Finances and Budget
 - Membership Chair
 - Professional Development Chair
 - Nominating Committee Chair
 - Other Committee Chairs
 - Topics to be covered:
 - Current status and outlook:
 - Financials, including non-dues revenue
 - Leadership succession plan
 - Programs
 - Membership
 - President's vision
 - Prioritize goals and objectives from Committees:
 - Program plans and budgets
 - Assignments
 - Responsibilities
 - Delivery dates
- ☐ PD Cte. update on calendar of events for Chapter year; public announcement by **July 1**.
- ☐ Distribute Board meeting schedule for Chapter year.

Post-Planning Day Follow Up

- ☐ Chapter plans and budgets will be laid out for the upcoming year in time to report the amount of our **Chapter dues** to National by **June 2020**.

Date due for BOD review: _____

Responsibility—Treasurer/Membership Chair—BOD approval

- ☐ **Chapter Organization Report**—Completed and sent to National by **June 8, 2020**.

Date due for BOD review: _____

Responsibility—President/Nominating Committee Chair

- ☐ **Membership Goals**—Include any needed adjustments to be made following Planning Day. We are basing this projection on specific targeted activities for member recruitment / retention, program attendance, and sponsorships in the coming year.

Date Due for BOD review: _____

Responsibility—Membership Chair—BOD approval

- ☐ **Audit**—The Chapter's financial books and records will be reviewed by a third party, not a member of the Board of Directors, prior to the new Secretary/Treasurer assuming office.

Date Due for BOD review: _____

Responsibility—President/Secretary/Treasurer

- ☐ **Chapter Action Plan**—Responsibilities/Delivery Dates

Date due for BOD review: _____

Responsibility—President/input from BOD & Committee Chairs

- ☐ **Chapter Events Calendar**—Completed/ready for publication by **July 1, 2020**.

Date due for BOD review: _____

Responsibility—Professional Development Chair



President's Planning Checklist 2020

Date	Responsibility	Completed
Apr/May	Participate in National leadership training	_____
	Debrief training with BOD & Committee Chairs	_____
	Mission Set	_____
	Organizational Chart Set	_____
	People Committed	_____
	Planning Meeting Ready	_____
May	Conduct Planning Meeting	_____
	Committees Meet	_____
	Set Membership Goals	_____
	Committee Plan Sheets with Budget Submitted	_____
	Audit of Chapter Financials	_____
	Annual Meeting/Installation of Officers	_____
June	Plans Finalized with Budget & Dues Recommendations	_____
	Plans, Budget & Dues Approved by Board	_____
	COR and Local Dues Sent to National by 6/15/2020	_____
	New Board Orientation	_____
July 1	Official Start Date of New Chapter Year	_____
	Calendar of Events Set and Announced	_____
July	First Board Meeting	_____
	Treasurer's Report—Budget Reviewed	_____
	Bylaws Distributed	_____
	Mission and Action Plans Reviewed	_____
	Membership Goals, Plans, Assignments Reviewed	_____
	Calendar Distributed	_____
	Old Business	_____
	New Business	_____

Chapter as a Legal Entity

See also "[What Boards Need to Know](#)" in Chapter Leaders website

- ☐ Our **Chapter bylaws** are in order and each volunteer is prepared to follow the rules set forth.

Date of most recent update: _____

Responsibility—President

FSP Staff contact: Anne Rigney, Corporate Counsel – arigney@SocietyofFSP.org

- ☐ Our **Articles of Incorporation** are current and the correct entity name is on record with the proper governmental authorities. * *Note: Some states have an annual filing requirement.*

Date of most recent update: _____

Responsibility—President

FSP Staff contact: Anne Rigney, Corporate Counsel—arigney@SocietyofFSP.org

- ☐ We are in compliance with the **IRS reporting requirements**.

Reporting forms filed with state and national authorities on: _____

Responsibility—Secretary/Treasurer

IRS Reporting Requirements (see <http://www.irs.gov/charities/nonprofits/index.html>)

1. **ALL** Chapters must **file annual information returns** with the IRS—Form 990-N (e-Postcard), Form 990-EZ, or Form 990—Check the IRS Web site for information.
2. Organizations that **fail to file** required e-Postcards or information returns for three consecutive years will **AUTOMATICALLY LOSE THEIR TAX-EXEMPT STATUS**.
3. Associations that fail to file required returns or reports to the IRS may be subject to penalties.
4. The return is due 4 months and 15 days from the end of your fiscal year (**November 15th** for fiscal years that end June 30th).

FSP Staff contact: Donna Conrad, CFO—dconrad@SocietyofFSP.org

Measures of Progress

Accountability

The President is responsible for making sure everyone does their job. Board members and committee chairs are responsible for carrying out the duties of their positions.

☐ At Board meetings:

- Review reports from all Committees
- Go over membership numbers; progress towards recruiting/retention goals
- Follow up on action plan items, status of projects, delivery dates
- Debrief events; use lessons learned to improve upcoming programs
- Address any financial matters requiring Board attention or vote
- Adjust strategy and plans, if needed; communicate with Committee Chairs

Resources

Staff at National: Chapter Development—**800.927.CHAP (2427)**

Amy Johnson, Director x 2516/ajohnson@SocietyofFSP.org

Member Services: info@SocietyofFSP.org

Legal, Anne Rigney, General Counsel x2536/arigney@SocietyofFSP.org

Financial, Donna Conrad, CFO x2557/dconrad@SocietyofFSP.org

FSP Chapter Leaders Web site: www.fspleadership.org



Nominating Committee Leadership Plan Worksheet

Chapter Name _____ Fiscal Year _____

Nominating Committee Chair _____

Vice Chair _____

Committee Members _____

Charge: Ensure qualified leadership succession

Responsibilities:

1. Identify qualified individuals to serve as officers, directors, and committee members
2. Recruit—Share objectives and goals; how their participation will make a difference
3. Get commitment—Invite to serve; share the duties, expectations, time required
4. Create the slate of officers for nomination for the following year
5. Be prepared to help the President fill vacancies should any arise during the year

Goals and Objectives:

1. Nominate the best qualified candidates to lead the Chapter
2. Engage new members in volunteer service immediately
3. Achieve balance in terms of diversity of practice specialty, age, gender, ethnicity
4. Ensure continuity/progress for Chapter mission, vision, and goals to meet member needs

Plan of Action

Target Date	Plan of Action	Assigned to
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget

Revenue Budget	_____
Expense Budget	_____
Net Revenue	_____

Leadership Development Best Practices/Ideas

- ☐ Review Chapter bylaws for leadership eligibility requirements and election process
- ☐ Staff a Nominating Committee. Ensure variety of disciplines & ages are represented
- ☐ Set calendar for leadership identification/recruiting/training activities.
- ☐ Purposefully recruit for diversity and youth in leadership roles.
- ☐ Track progress at every Nominating Committee & Board meeting.

Ideas for Leadership Development

- ☐ Charge Committee Chairs and Board to look for “rising stars” with leadership talent in their groups and in the Chapter at large. Identify those people to the Nominating Committee.
- ☐ Work with senior-level executives, partners, and GAs to identify young people/junior partners who may benefit from leadership experiences in the Chapter.
- ☐ Have a succession plan to prepare future leaders. Helpful if candidates bring hands-on experience in Membership and Professional Development.
- ☐ Establish a new Board onboarding procedure and ensure leaders know where to access resources and National staff.
- ☐ From new members come new leaders. Immediately engage new members in volunteer work whenever possible—have a process to do so.
- ☐ Connect younger members with seasoned veterans for leadership insights and mutual personal professional development opportunities.
- ☐ Promote opportunities to get involved and make a difference. “Assume consent”. Create a culture where members understand that as part of a volunteer organization, they will provide service. Publicize volunteer opportunities: specific tasks, episodic volunteer opportunities, service on Board and committees.
- ☐ Publicly recognize volunteers at every opportunity. Feature them in a “spotlight” story in your newsletter or Web site. Put notice of new officers in local media.
- ☐ Leadership, like membership, is all about asking someone. Personal invitations are best.

Calendar: Nominating Committee/Leadership Development

- May–June:** Nominating Committee Chair conducts research
1. Obtains feedback from outgoing leadership team on prospective volunteers
- July:** Nominating Committee selected
1. Committee members invited to serve
 2. Committee members provided a copy of the Chapter bylaws regarding the nominations and election process
 3. Asked to review their list of connections for possible Board candidates for consideration
- August:** Convene Nominating Committee
1. Review list of those progressing through the Chairs
 2. Review list of potential additional nominees
 3. Select viable candidates
 4. Create list of second/third alternates
 5. Determine which Nominating Committee member will be responsible to recruit each candidate
 6. Nominating Committee members should be versed in position requirements, desired skill set, time commitment, and resources for training and support
 7. Connect with candidates and recruit
 8. Report progress to Chair
- October:** Nominating Committee meets
1. Report on recruiting progress
 2. Explore additional possibilities if first or second choice declines
 3. Start filling in slate of officers, names of others who will serve in other capacities, such as committee chair
- November:** Nominating Committee meets
1. Create final slate of officers and other volunteer names
 2. Chair presents to President, President Elect, and Board
- December:** Candidates notified of their placement on the official slate
- Spring:** Notification of slate of officers presented to Chapter members
1. The Nominating Committee announces nominations for the offices of President, Vice President, Secretary-Treasurer, and members of the Board of Directors to the membership not less than forty-five (45) days prior to the annual meeting.
 2. The final list of nominees, if changed from the original announcement, must be provided to the membership not less than 10 days prior to the annual meeting.
 3. New officers are elected at the Chapter's annual meeting and immediately installed in office.

FSP Chapter Leadership Positions

Required positions:

President, President Elect, Secretary/Treasurer, Membership, Nominating, Professional Development

Chapter Officers

Chapter President

President Elect

Secretary / Treasurer

Immediate Past President

Chapter Directors

Directors – Consult your bylaws for the required number of Directors

Chapter Committee Chairs

Membership Chair

Professional Development Chair

Nominating Committee Chair

Chapter Young Professional Advisor

Sponsorship Chair

Webmaster

Chapters may have other committees / project groups based on their plans for the year.

Position descriptions are on the FSP Chapter Leaders Website / Leadership

[FSP Position Descriptions](#)

[Sample Chapter Executive Responsibilities](#)



Professional Development Planning Worksheet

Chapter Name _____ Fiscal Year _____

Professional Development Chair _____

Committee Members _____

Charge: Advance members' professional capabilities through excellent educational programs and relationship-building opportunities.

Responsibilities:

Goals and Objectives:

Plan of Action

Target Date	Plan of Action	Assigned to
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget

Revenue Budget	_____
Expense Budget	_____
Net Revenue	_____

Professional Development Best Practices/Ideas

- ☐ Staff a PD Committee. Ensure variety of disciplines & ages are represented.
- ☐ Set calendar for specific program/event activities throughout the Chapter year.
- ☐ Ensure there is a membership recruitment/retention element to every event/function.
- ☐ Set goals for engagement/participation and track progress at every PD & Board meeting.

Ideas for Programs and Engagement

- ☐ Purposefully recruit diverse members to serve on Professional Development Committee.
- ☐ Survey members for meeting preferences—venues, times, topics, types of events, Speaker suggestions, panels, case studies, etc.
- ☐ Use National Society Resources:
 - ☐ FSP Case Study Programs
 - ☐ Webinars
 - ☐ Journal Live - conference calls with the author sessions
 - ☐ Study groups using *Journal* and Sections newsletter articles
- ☐ Contact the Professional Development group at National for trending topics, event and speaker ideas.
- ☐ Offer CE credits for all disciplines.
- ☐ Intersperse social events in calendar year. Ensure there is adequate time for networking at all functions.
- ☐ Define event marketing strategy—number of email “touches” to members/nonmembers, Web site, social media (Facebook, LinkedIn, Twitter), print.
- ☐ Continuously demonstrate value. All marketing communications should focus on how the program topic benefits the member. Follow up post-meeting—put a “Here’s what you missed” message to nonparticipants following event.
- ☐ Take photos at every event. Post on Social Media and Web site, tag people. Submit to local media and online news outlets. Along with publicizing event & Society, show members engaging in Chapter programs—how their professional expertise benefits the community.
- ☐ Offer programming/value in summer months—educational program, webinars, or relaxed social events where people have time to connect.

Plans for Professional Development/Chapter Year 2020–2021

<u>AUG</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>SEPT</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>OCT</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>NOV</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>DEC</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>JAN</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>FEB</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>MAR</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>APR</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>MAY</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>JUN</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

<u>JUL</u>	<u>Assigned to</u>	<u>Event</u>	<u>Topic</u>	<u>Speaker(s)</u>	<u>Sponsor/Notes</u>

Chapter Program Plan Template

For each item, list pertinent information, including who is responsible, deadlines for completion, and resources required: people and financial.

Design the Program

Type of Event:

Project Owner/Supporting Cast:

Anticipated Audience:

Appeals to Professional Interest Section(s):

Topic:

Speaker(s):

Agenda:

Venue:

Date/Time:

Impact on Member Retention and/or Recruitment:

Pre-Event Planning: Checklist & Assigned Responsibilities

Budget and Participant Fees:

Sponsorship:

Engage Speaker/Point of Contact:

Meeting Planning:

Site Selection/Reservation:

Meal & Beverage Arrangements:

Event Registration:

Handout Materials:

A/V Requirements:

Assist Speaker with Transportation/Lodging:

Marketing Plan:

File for Continuing Education Credits:

Event Day: Checklist & Assigned Responsibilities

On-site Meeting Management:

Registration/Welcome Table:

Promote FSP Benefits & Services:

CE Monitor:

Master of Ceremonies:

Speaker Liaison:

Sponsor Liaison:

Membership Committee:

 New Members:

 Guests/Potential Members:

 Membership Table:

Board Roles:

Thank You/Recognition:

Payment to Venue/Speaker Honorarium:

Evaluation Form:

Post-Event Follow Up: Checklist & Assigned Responsibilities

Make Timely CE Filings:

Debrief/Review Evaluations:

Social Media Post about the Event

Chapter Newsletter Article about the Event:

Tracking Participants:

Follow Up with Potential Member Attendees:



Chapter Program Budget Worksheet

Program Name _____

Program Date/Location _____

Existing Program / New Program

Program Chair _____

Revenue

of Attendees at Member Price _____

of Attendees at Nonmember Price _____

Member Price _____

Nonmember Price _____

Member Price Revenue _____

Nonmember Price Revenue _____

Sponsorships _____

Total Revenue _____

Expense

Speaker Honorarium _____

Hotel/Room Rental _____

Food/Beverage _____

Audio/Visual _____

CE Filing Fees _____

Promotion _____

Speaker Expenses _____

Miscellaneous Expenses _____

Total Expense _____

Net _____



Membership Planning Worksheet

Chapter Name _____ Fiscal Year _____

Membership Chair _____

Committee Members:

Charge: Recruit, serve, and retain members.

Responsibilities:

Goals and Objectives:

Membership History 2019–2020

Membership Goals 2020–2021

_____ # Members Retained

_____ # Members Retained

_____ # Members Recruited

_____ # Members Recruited

_____ Total # Members a/o June 30, 2020

_____ Total # Members a/o June 30, 2021

Strategies—Recruitment

Target Date	Plan of Action	Assigned to
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Strategies—Retention

Target Date	Plan of Action	Assigned to
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget

Revenue Budget _____
Expense Budget _____
Net Revenue _____

Membership Best Practices/Ideas

- ☐ Staff a Membership Committee. Ensure variety of disciplines and ages are represented.
- ☐ Set a recruiting expectation for all Board members.
- ☐ Set calendar for specific recruitment/retention activities throughout the Chapter year.
- ☐ Track progress towards Membership Goals at every MC & Board meeting.

Ideas for Retention

- ☐ Continuously promote member benefits—local and National value. Teach people how to use benefits and personal connections to their best advantage.
- ☐ Get more members involved assisting with small tasks, serving on committees, becoming a Board member. Engage new members in volunteer roles immediately.
- ☐ Survey members for ways they can volunteer use their office space, speak or facilitate at event, greet at meeting, sponsorships, committee or board service.
- ☐ Have specific strategies for engaging new members in their first year.
- ☐ Implement tracking system to see who participates in meetings. Thank those who attend. Reach out to those who don't and see what types of events interest them.
- ☐ Hold a retention Phone-A-Thon in November. Personally contact unrenewed members.
- ☐ Create/offer/promote a WOW event or service annually that captures members' attention.

Ideas for Recruitment

- ☐ Promote the Young Professionals membership category with reduced dues rates for Regular and Associate members age 40 and under.
- ☐ Use the [Chapter Membership Marketing Tools](#) – resources from FSP National including brochures, flyers, social media guide and much more.
- ☐ Promote the [Membership Growth Initiative](#) with reduced National dues rates for recruiters.
- ☐ Have the Board and Membership Committee list of all the people they know who should be members. Solicit names from members. Create a strategy to follow up and invite to join.
- ☐ Submit prospect names and contact information to National to include in National membership outreach efforts.
- ☐ Purposefully recruit young and diverse members. Immediately engage them in volunteer and leadership roles in the Chapter.
- ☐ Connect with younger members and ask them what they want out of their FSP membership. Ask them for names of other young professionals who would benefit by joining & to add to your prospect database.
- ☐ Visit with senior decision makers at local firms - accounting, legal, financial planning, insurance agency managing partners/GAs. Show value of FSP for their younger associates—education and networking to grow their business.
- ☐ Conduct joint meeting with other local organizations such as FPA, AICPA, Bar Association, WIFS, NAEPC, financial service associations organized along gender or ethnic affinity lines. Introduce new prospects to value of FSP membership.

Action Plans for Membership

Date	Plan of Action	Assigned to
July	Recruiting: Retention:	
August	Recruiting: Retention:	
September	Recruiting: Retention:	
October	Recruiting: Retention:	
November	Recruiting: Retention:	
December	Recruiting: Retention:	
January	Recruiting: FSP Institute Retention:	
February	Recruiting: Retention:	
March	Recruiting: Retention:	
April	Recruiting: Retention:	
May	Recruiting: Retention:	
June	Recruiting: Retention:	

Calculating Chapter Dues Revenue for Budget Planning

CHAPTER MEMBERSHIP REVENUE			
	NUMBER of MEMBERS	CHAPTER FEE (DUES)	TOTAL (# x FEE)
Regular		\$	\$
Young Professional		\$	\$
Associate		\$	\$
Retired		\$	\$
Student		\$	\$
TOTAL		\$	\$
New Members			\$
FINAL TOTAL			\$

Please contact Member Services at (800) 392-6900 / info@SocietyofFSP.org with any questions.



Communications Team Worksheet

Chapter Name _____ Fiscal Year _____

Communications Chair _____ Webmaster _____

Manager—Social Media Channels _____

Charge: Effectively communicate with members/prospects. Raise awareness; build FSP status/image. Promote events, services and membership. Present professional online image in accordance with FSP branding standards. Provide virtual community for people to connect and collaborate.

Responsibilities:

Goals and Objectives:

Plan of Action

Target Date	Plan of Action	Assigned to
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget

Revenue Budget	_____
Expense Budget	_____
Net Revenue	_____

CHAPTER MICROSITES AGREEMENT

THIS AGREEMENT (the "Agreement") is made and entered into this _____ day of _____, 20____ ("Effective Date"), by and between the SOCIETY OF FINANCIAL SERVICE PROFESSIONALS (hereinafter "FSP"), of Newtown Square, Pennsylvania, and the _____ FSP Chapter (hereinafter "Chapter"), of _____.

BACKGROUND

FSP and Chapter understand the need for Chapter to have an up-to-date Web presence in order to effectively provide value to existing members and to promote the benefits of membership to potential members. Further, FSP and Chapter recognize that maintaining a Web presence is challenging in terms of costs, technical expertise, and time for maintenance, updating, and training. Therefore, it is FSP's objective to support Chapter by making available a templated Web site ("Microsite") with certain automated content and optional customized features.

TERMS

In consideration of the mutual promises contained herein, the parties agree as follows:

1. **Features.** The FSP-provided Microsite will include the following features:
 - Home page that includes FSP branding; links to: Join/Renew, National events, "About FSP" and Contact information will be provided.
 - Officer listing (automated from FSP's database).
 - Chapter dues rate in various categories (automated from FSP's database).
 - Calendar feature that includes FSP national programs and events and allows the Chapter administrator to post Chapter programs and events.
 - National Member Discount Company ads will be shown on home page.
 - Sponsorship feature that allows Chapter to insert unlimited sponsor data, including a sponsor image, links to sponsor's homepage and sponsor-related information.
 - Custom pages—preformatted pages with custom Chapter content, for example, a Chapter newsletter.
 - Member-only Directory (a link to log-in protected data from the FSP database).

Additional features may be added at FSP's discretion. Features may be discontinued by FSP upon thirty (30) days' written notice to Chapter.

2. **Chapter Responsibilities.** Chapter will have the ability to create and/or update certain Microsite content. Chapter has responsibility for ensuring the accuracy of and for maintaining this Chapter-provided data. Chapter agrees not to post information on the Microsite that violates the intellectual property rights or other legal rights of any third party.
3. **Sustainability.** It is understood and agreed that it is the intention of this Agreement that the Microsites will be database-driven and will operate with minimum hands-on intervention from FSP staff. Training will be provided on an as needed basis.

4. **Security.** FSP agrees to maintain the security of the Microsite and will provide limited security authorizations to Chapter designated personnel as necessary to fulfill Chapter's obligations herein.
5. **Custom Requests.** Chapter may submit requests for FSP to build out custom features for the Microsite to the FSP Chapter Development staff. Requests will be honored based on the availability of FSP resources and upon Chapter acceptance of pricing for custom services.
6. **Fees.** Except as noted in Paragraph 5 for custom services, the Microsite will be provided to Chapter at no cost during the initial term of this Agreement. Following the initial term, the parties agree to negotiate in good faith a mutually acceptable compensation provision, with the possibility that the Microsite will continue to be provided at no cost.
7. **Term and Termination.** This Agreement will become effective as of the Effective Date and shall, unless terminated as provided herein, remain effective for an initial term of one (1) year. The Agreement shall automatically renew for successive one (1) year periods unless otherwise terminated by either party for any reason or for no reason by giving notice to the other party not less than thirty (30) days prior to the end of the term.

Notwithstanding the foregoing, this Agreement may be terminated by either party immediately upon notice if the other party: (a) becomes insolvent; (b) files a petition in bankruptcy; or (c) breaches any of its obligations under this Agreement in any material respect, which breach is not remedied within thirty (30) days following receipt of written notice from the other party.

8. **Ownership.** The parties agree that FSP owns all right, title and interest in FSP-provided content and trademarks. The parties agree that Chapter owns all right, title, and interest in Chapter-provided content and trademarks.
9. **Limitation of Liability.** Under no circumstances shall either party be liable for indirect, incidental, consequential, special or exemplary damages arising from this agreement, such as, but not limited to, loss of revenue or anticipated profits or lost business.
10. **Indemnification.** The parties agree to indemnify and hold harmless each other, their officers, directors, and employees, for any claims and expenses, including reasonable attorney's fees, arising out of or relating to their responsibilities herein.
11. **Entire Understanding.** This Agreement represents the entire understanding of the parties hereto. Additions or amendments to this agreement must be reduced to writing and signed by all parties.

ACCEPTED AND AGREED TO:

CHAPTER

SOCIETY OF FINANCIAL SERVICE
PROFESSIONALS

By: _____

By: _____

Print Name

Print Name

Title

Title

Date

Date

Send to Brian Horn / bhorn@SocietyofFSP.org

FSP National Staff Contacts

Society of Financial Service Professionals
3803 West Chester Pike, Ste. 225, Newtown Square, PA 19073
800-927-2427 (CHAP) / www.SocietyofFSP.org

Chapter Services

Amy Johnson	<i>Director</i>	x2516	ajohnson@SocietyofFSP.org
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Executive Office

David Maola	<i>CEO</i>	x2551	dmaola@SocietyofFSP.org
Anne Rigney	<i>General Counsel</i>	x2536	arigney@SocietyofFSP.org

Finance

Donna Conrad	<i>CFO</i>	x2557	dconrad@SocietyofFSP.org
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Operations & Technology

Brian Horn	<i>COO-CIO</i>	x2519	bhorn@SocietyofFSP.org
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Marketing & Membership

Donna Giacobello	<i>Director: Marketing & Communications</i>	x2524	dgiacobe@SocietyofFSP.org
Joel Allen	<i>Director: Creative Services</i>	x2528	jallen@SocietyofFSP.org
Michele Borsuk	<i>Director: Member Services</i>	x2555	info@SocietyofFSP.org

Corporate Development & Sponsorship

Michelle Connor	<i>Director</i>	x2561	mconnor@SocietyofFSP.org
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Professional Development

Patti McFadden	<i>Managing Director</i>	x2508	pmcfadden@SocietyofFSP.org
Shannen Griffin	<i>Manager: Webinars</i>	x2518	sgriffin@SocietyofFSP.org
Caprice Evans	<i>Coordinator: Accreditation</i>	x2507	cevans@SocietyofFSP.org