CFA Society Los Angeles

# 2017 – 2020 Strategic Plan

## Mission

*CFA Society Los Angeles promotes integrity, professional excellence and engagement among its members and within the community.*

### Member Value

*Meet the evolving needs of our members*

- Deliver the highest quality and most relevant programming and content to our members.
- Improve career development opportunities via marketing, job boards, networking opportunities and education.
- Increase value to underserved members by forming topical, geographic, diversity and/or career level subgroups.
- Coordinate with the CFA Institute to enhance brand awareness in our communities.

### Engagement

*Position the Society as the center of influence for the financial community in Southern California*

- Increase the number of members that engage in some way with the Society.
- Increase the number of active volunteers including those in leadership positions.
- Establish relationships with employers, via the use of an "Ambassador" liaison program or other engagement program.
- Enhance the university liaison program.

### Infrastructure

*Enhance the infrastructure necessary to support the organization's mission*

- Assure staff is well resourced, informed and involved in decision-making.
- Enhance the use of technology to streamline operations and improve the member experience.
- Develop a succession plan to assure we have a steady pipeline of qualified and motivated future leaders.
- Revisit our organizational structure and programming modus operandi to ensure we are maximizing value for the resources used.