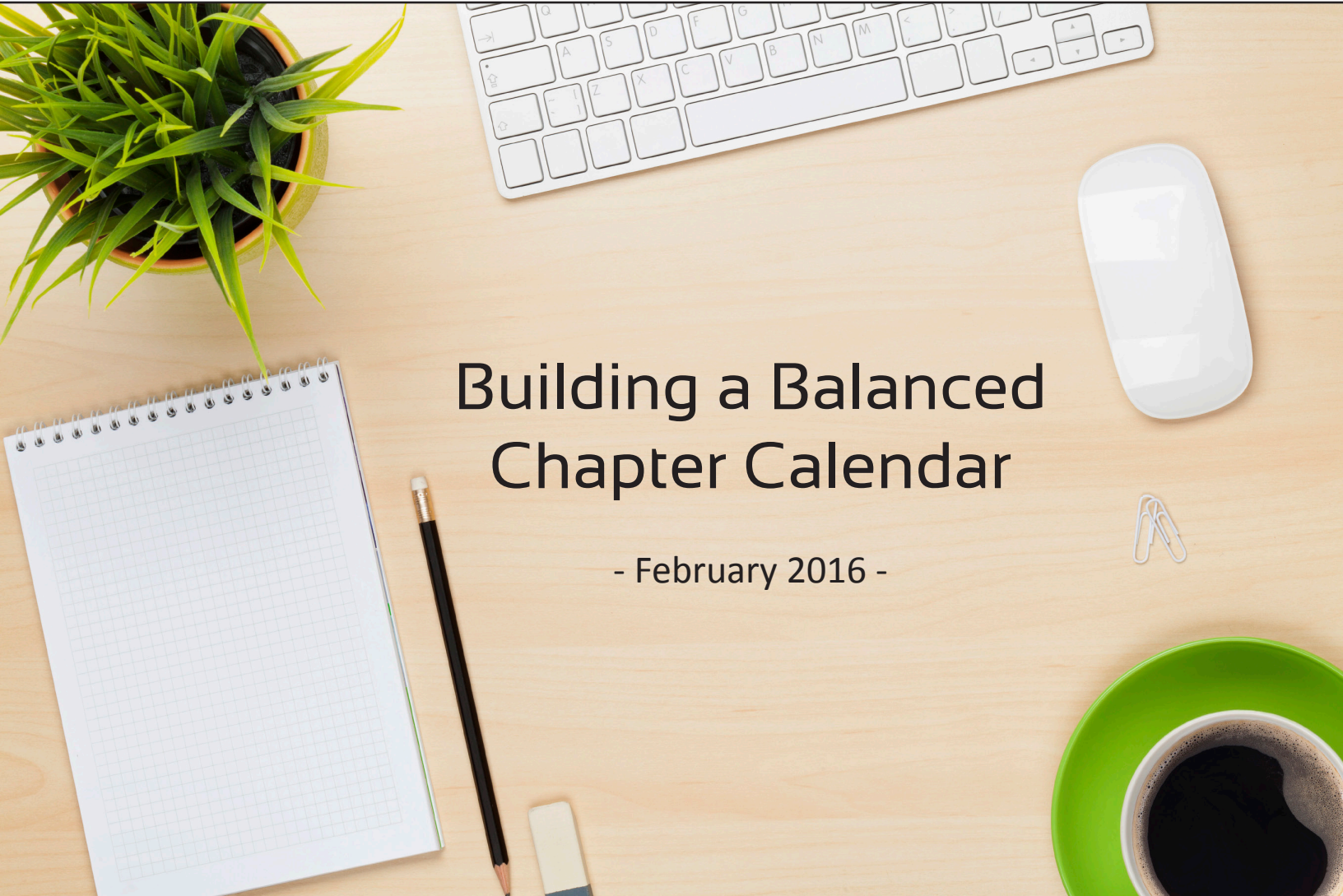




Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD



Building a Balanced Chapter Calendar

- February 2016 -

A guide for the AFWA Programming Committee. AFWA membership is diverse, with members representing all different stages of career and career paths, your Chapter calendar should be built to match.

AFWA Headquarters
2365 Harrodsburg Road, Suite A325 | Lexington, KY 40504
p: 800.326.2163 | e: afwa@afwa.org



IN THIS GUIDE:

Getting Started...2 Recruitment...3 Engagement...6 Retention...8

AFWA is a professional organization. While we enjoy getting together for wine, cooking and painting classes, or shopping – we also come together for a common interest and need for education in the accounting and finance industries.

At the National level, we've found a niche in providing personal development resources for our members. We're providing this through webinars, eDocs, and leadership opportunities. While Chapters can also address personal development topics, we really look to you to meet the technical needs of our members. This is partly because different states have different requirements and at the local level, you know better than anyone what is needed in your market.

A strong calendar for your Chapter is going to have a balance of networking events with a diverse combination of technical and professional development education.



PLAN FOR YOUR AUDIENCE

AFWA membership is diverse. Our members are at different stages of their careers and on different career paths. We have business owners, firm partners, staff accountants, tax managers, and financial planners. Finding programming topics that fit everyone's interests can be difficult.

1. Survey your current membership to find out their needs: This can be a great conversation starter when meeting new members, or consider adding the question to your regular CPE evaluation which attendees already complete after each session.
2. Consider potential members and develop programming that will attract them: If your membership committee has their eye on a particular business or firm in your community, plan an event based on a topic that will interest those potential members.

Do you have an idea for a future AFWA CPE program?

What topics do you need to fulfill your CPE requirements?

AFWA Chapters are diverse. Some Chapters are made up of younger professionals, while others have more senior members. There's not necessarily a blanket plan that will work for all Chapters – ultimately, you have to find what's best for your Chapter - but we can all share and learn from each other.

- Connect with other Chapters on the AFWA LinkedIn Members Exchange to share ideas and ask questions.
- Follow other Chapters on social media, such as Facebook, to find out what events they have on the horizon.

NASBA FIELDS OF STUDY

NASBA recognizes 23 fields of study which represent the skills needed by accountants to carry out their services. A complete list of these fields is available in the Programming Toolkit on the AFWA Members Portal.

CHALLENGE:
Identify your fields of study first, then find programming to fit.

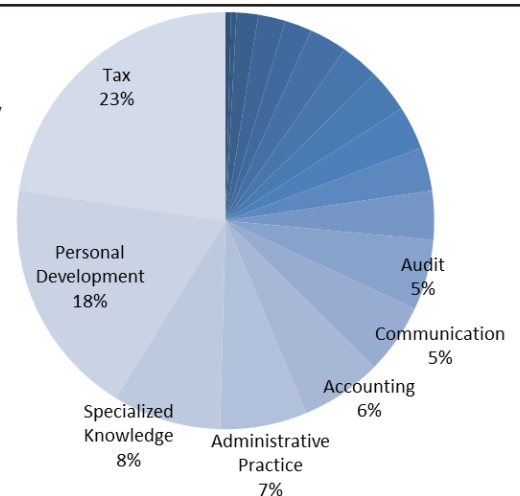
We have a tendency to schedule our programs and then look to this list to see which field fits best. Turn the table, and look to the fields of study list first. Identify 4 or 5 areas that you know you want to cover in your Chapter's calendar year. This will help your chapter out of an "accounting" rut, or a "personal development" rut and will challenge you to cover more diverse programming topics throughout the year. Again, ask your members what fields they need to fulfill their CPE requirements and target your programming to those topics.

Did you know CPE from AFWA also meets the education requirements of maintaining a CMA license. Keep this in mind as you develop your programming topics, and when inviting potential members to attend.

In 2015, AFWA provided CPE in 18 of the 23 NASBA Fields of Study

Of 276 approved CPE hours provided by AFWA in 2015,

- 23% were in the Tax field
- 18% in Personal Development
- 8% in Specialized Knowledge
- and so on...



How many fields of study did your Chapter sponsor last year?

In addition to 23 fields of study, NASBA identifies 5 levels of education. The far majority of CPE hours offered by AFWA in 2015 were labeled as "basic". Based on the definition below, is "basic" a fair representation of your Chapter membership? Might your presentations be a higher skill level, and you're simply not identifying them as such?

Challenge your programming committee to incorporate more Intermediate and

Advanced topics into your programming calendar. Acknowledge that an advanced session may not be suitable for all your members – that's okay – that's why you build a diverse and balanced calendar.

CHALLENGE:
Incorporate intermediate and advanced programming into the Chapter calendar

NASBA PROGRAMMING LEVELS

- **BASIC** - Most beneficial to CPAs new to a skill or an attribute such as staff or entry level, or seasoned professionals with limited exposure to the area.
- **INTERMEDIATE** - Builds on a basic program, most appropriate for CPAs with detailed knowledge in an area. Mid-level with operational and/or supervisory responsibilities.
- **ADVANCED** - Most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications. Seasoned professionals or others with specialized knowledge in a subject.
- **OVERVIEW** - General review of a subject area from a broad perspective. Appropriate for professionals at all organizational levels.
- **UPDATE** - General review of new developments. This level is for participants with a background in the subject area who desire to keep current.

PROGRAMMING CALENDAR

Many AFWA Chapters are operating on a traditional calendar of hosting a regular monthly CPE lunch. For some Chapters, this model works great, but other Chapters are experiencing high costs, low attendance, and volunteer burnout. Consider trying something new by varying the time, day, and location of your events. Consider a complete calendar makeover.

CHALLENGE:
Consider a calendar
make over

Here are a few Programming Calendar ideas >>

TRADITIONAL

Remember, AFWA minimum standards require just 6 events per year, so you could host a CPE event one month, and a happy hour or networking event the next month.

ADVANCED PROGRAMMING

Host a quarterly advanced CPE workshop. Knowing the advanced workshop may appeal to a smaller segment of members each quarter, fill in the other months with Personal Development CPE and networking happy hours.

TRACKS

The AFWA National Conference is built around tracks, giving everyone the option to pick the sessions that work best for them. Larger chapters may have the flexibility to rotate sessions, based on an accounting track, a finance track, and a young professionals track. Some months may host multiple events. But be sure to host a Personal Development or other networking event at least once a quarter to bring everyone together.

CLUSTERED CPE

Host 4 half or full day CPE seminars, one each quarter, with monthly casual networking events in between.

MORE PROGRAMMING IDEAS!

There are countless programming ideas for Chapters. If you're stuck on ideas, visit other AFWA Chapter webpages, or follow the social media accounts of other Chapters. Visit the Chapter Forum on the Members Portal or the Members Exchange on LinkedIn, to ask for and share ideas. Here are just a few ideas to inspire your creativity >>

TECHNICAL

- **TAX:** Many chapters host a tax event in January, this could be an annual tax update or an advanced tax seminar. If your chapter isn't hosting a tax event, you may want to consider it – these are typically highly attended events.
- **LOCAL/STATE OR GOVERNMENT:** Many chapters host an event with an invited government official to discuss topics specific to business in their community.
- **ETHICS:** Ethics is a specific CPE requirement, every chapter should be hosting an annual Ethics program of some kind.

NETWORKING

- **ANNUAL HOLIDAY PARTY:** include a fundraising or charitable giving element to the night.
- **COFFEE AND DONUTS:** maybe after work drinks isn't for everyone – try getting together for casual networking over coffee first thing in the morning.
- **PROFESSIONAL ROUNDTABLES:** these can be an opportunity for small groups of members with similar interest to get together over breakfast, lunch, or dinner.

PERSONAL DEVELOPMENT

- **BROWN BAG LUNCH:** Ask a local firm to host your monthly program, everyone brings their own lunch. This might be a great program for YPs to get up close and personal with firm partners or business owners.
- **RESUME NIGHT:** Invite and HR professional for hands on resume review with students, YPs, and members looking for a career change.
- **STUDENT NIGHT:** Invite students to listen to a panel of AFWA members talk about career paths, maybe combined with a scholarship recognition night
- **JOINT PROGRAM:** Invite others into the AFWA network with a joint event hosted with the State CPA Society, IMA, ALPFA, FEI, or other local organization

FINDING SPEAKERS

So now you have a calendar with topics identified to cover throughout the year – how do you find the speakers to fill those spots? For starters >>

- **Savvy Series Webinar:** AFWA offers a monthly Savvy Series webinar, which offers CPE in Personal Development. Recordings of these may be re purposed for Chapter Programming - great for a last minute fill in!
- **Membership and Member Employers:** Don't overlook your own members - there is a lot of talent within AFWA membership.
- **Local colleges and universities:** not just in accounting and finance for technical topics but also look at other departments for relevant professional development or business management: Communications, Marketing, Public Administration, Leadership
- **Chamber of Commerce:** for leadership topics or local business updates.
- **LinkedIn:** search connections locally for specific topics your members are looking to know more about
- **Your State Nonprofit association:** usually has some great presenters that they work with in a variety of topics. Finding your state association – look to the National council of Nonprofits - www.councilofnonprofits.org/find-your-state-association
- **Women Speakers:** womenspeakersassociation.com
- **Business publications:** scour local and state business publications for potential speakers
- **Federal employees:** Locally based federal employees are encouraged to speak to groups and typically cannot charge a fee
- **Other speaker associations:** NSAspeaker.org; freespeakerbureau.com

REGISTRATION FEES: Make membership in AFWA more valuable for your members! Pricing for your events should be such that attendees will see the value in joining the organization. Here are a few ideas to set your event pricing.

- First time attendees for FREE: its nice to have an incentive to bring a guest or try something new.
- Limit attendance of non-members to 2-3 programs per year: if they get value in attending events, they should give back to the organization by becoming a member.
- Non-Members should always pay more to attend: Consider the difference a non-member might pay throughout the year to attend events. Make sure the total shows savings by becoming a member!
- Consider charging more for advanced CPE
- Promote cost of CPE not cost of food: Attendees aren't paying for meal, they're paying for education.

DON'T DO IT ALONE

Programming a big responsibility and should be a team effort. Utilize your Board, or bring in additional volunteers, to build a Programming Committee and divide up the work. For example:

Programming Chair:

The chair of the programming committee manages the Chapter programming calendar and coordinates regular presentation/CPE programming. Consider a sub-committee meeting to be held at a different time than the regular board meeting – you'll be amazed at the ideas that can grow over a cup of coffee.

Social Chair:

The Social Chair coordinates networking events, such as happy hours, casual lunches, community or social events.

CPE Administrator:

The CPE Administrator ensures appropriate documentation is forwarded to AFWA headquarters following each CPE event.

In addition, the Programming Chair will work closely with the Membership and Hospitality committees to invite and greet attendees and the Communications committee to promote each event.

