

# **Golden West Council Strategic Plan 2016-2021**

The Golden West Council Board of Directors and Members use a Strategic Plan as long-range guidance in pursuing the Mission, Vision and Goals of the Council. The Council Board develops work initiatives and tasks that allow the achievement of those Council Goals.

## **Vision**

As a member of the world's leading association for management accounting and finance professionals, the Golden West Council empowers its Chapters to achieve their full professional potential. The Council's and Chapter's leadership is intended to aid in the education and practice of management accounting and financial management. The Council's commitment to ethical professional practice includes overarching principles that express our values and standards that guide our conduct. This vision will improve the world's understanding of accounting and financial processes.

## **Mission**

Golden West Council provides the forum to assist Chapters to:

- Enable their members to develop and advance their careers by obtaining a universally recognized certification (Certified Management Accountant) in the management accounting and financial management profession.
- Enable their members in the discovery and sharing of professional techniques and processes identified with the latest research and practice development of the profession.
- Enable their members to build a peer network of professional relationships.
- Enable their members to learn in a mutually supportive and positive environment.
- Enable their members to be part of a respected organization that can influence concepts and encourage high ethical standards in all areas of business.

## **Goals:**

### ***Support an Increase Membership Certification***

- GWC will facilitate CMA certification growth of chapters thru email blasts, mailings, and training programs.

### ***Promote Membership Retention and Growth***

- GWC will work with Chapters in achieving their goals in Membership.
- GWC will drive membership growth by increasing its partnership with the Business and Educational Community.

### ***Bolster Communications and Community Relations***

- GWC will achieve a consistent improvement in the communications within the Board, its Chapters, and Membership.
- GWC will improve and assist Chapters in increasing service representation of the IMA within the Region.
- GWC will stimulate communications interfaces with the business and academic communities within the Region.

### ***Strengthen the Legacy of the Council and Chapters***

- GWC will continue to maintain a Board of Directors and Chapter Delegates to aid in the facilitation of goals within the Chapters we serve.

### ***Improve Meeting Attendance***

- GWC will achieve full attendance representation at all Council Meetings.
- GWC will assist Chapters in achieving their goals in member attendance.
- GWC will create superior member value through leadership training and meetings that provide the opportunity for learning and growth.

### ***Foster Education and Competition***

- GWC will work with Chapters within the Council to strive to fulfill their goals in Chapter Competition.
- GWC will actively support Regional based and Chapter based educational activities

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## ***Revenue and Expenses***

- GWC will moderate its financial risk in Council activities.

## **Initiatives**

### ***Membership Certification***

- Provide a Regional CMA Certification network.

### ***Membership Retention and Growth***

- Develop a regional plan that:
  - Conducts an annual campaign to solicit companies that are not active with the IMA.
  - Conducts an annual campaign to solicit local colleges and universities that are not active with the IMA
- Perform Council activity advertisements.

### ***Communications and Community Relations***

- Produce a Quarterly Newsletter.
- Maintain a GWC Website.
- Streamline board meetings, yet allow each voice to be heard.
- Empathize the role of Council and Chapter Reports for sharing activities and ideas.

### ***Council and Chapter Legacy***

- Communicate directly with Council Board Members to ensure their work is done correctly and that they understand the importance of what they are doing.
- Communicate directly with Chapter Boards to ensure their work is done correctly and that they understand the importance of what they are doing.
- Develop the practice of assigning a mentor to each new Council Board member.
- Develop Council and Chapter member interest in Council Management to ensure future Board assets.

### ***Meetings and Attendance***

- Develop strategic partnerships with chapters to enable broad-based networking.
- Develop a variety of top-notch speakers for the Region, facilitated by a regional database of speakers, with contact information.
- Develop an arena of hospitality, leadership talent, and group vision.

### ***Education and Competition***

- Encourage GWC Chapters and members to participate in and report appropriate CPE.
- Encourage GWC Chapters and members to participate in REST.
- Encourage GWC Chapters to share activities and best practices.
- GWC will advertise Regional and Chapter activities through its communication streams.

### ***Revenues and Expenses***

- Market advertising for the Website and future GWC publications in an aggressive yet respectful manner.
  - Match the event pricing to the event cost.
  - Maintain a balanced budget.
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