



2019 – 2021 Strategic Plan

Overview

The CFAW Board of Directors, as representatives of its members, has the responsibility to set a clear direction for the future of the organization, establish necessary policies, practices, and priorities that help achieve this desired future, and hold CFAW accountable for annual performance. The CEO, staff and CFAW committees are responsible for the implementation of the Strategic Plan.

This plan is the result of the CFAW Board of Directors strategic planning meeting in September 2018. The CFAW Board of Directors review this plan annually and measure the society's performance against these strategic goals.

Mission Statement

To advance members' professional success and facilitate a vibrant, engaged community.

Vision

- To be the primary authority and respected thought leader in the DC community on all issues related to investments, global financial matters, and ethical standards in the industry.
- To have members across all demographics and industries engaged and participating actively in Society activities and sharing their time and expertise in support of the organization's mission, goals, and objectives.
- To provide meaningful opportunities to members for education, development of substantive professional relationships and dialogue.
- To have the value of the CFA charter known by employers, investors, and the local community.
- To operate as a premier membership association and as a prudent steward of society resources.

Values

- *Ethics and Integrity* - CFAW is guided by a Code of Ethics and Standards of Professional Conduct that are the ethical benchmark for investment professionals. We will act with integrity, competence, diligence, respect and in an ethical manner with one another, our members and the public.
- *Knowledge* - CFAW and its members share a commitment to maintaining and improving our professional competence and that of other investment professionals. We facilitate the exchange of ideas between our members and our community in order to enhance interaction and understanding of the CFA Charter.
- *Teamwork* - CFAW creates a collegial environment built on its reputation for trust, inclusion and networking. The Board and membership work together toward involvement and participation at all levels of the organization while keeping members updated and informed on practices and issues that affect the profession.
- *Community* – CFAW believes in a diverse and engaged community that values the contributions of all members. We foster an open, collaborative, and intellectually stimulating environment for member development and connection.

Strategic Goals

- Increase Membership
CFAW seeks to increase the size and value of membership through its efforts to raise brand awareness, analyze and increase the member value proposition, and increase the diversity of membership by optimizing the member benefits available to all potential members.
- Enhance Programming
CFAW is committed to bringing timely, relevant, and useful programming to its members and the regional investment community at large. The Society seeks to not only offer programming that spans the wide range of disciplines CFAW members cover, but also to host larger events which bring together a greater number of members and potential members.
- Expand Community Outreach
CFAW aspires to increase the internal awareness of member value to the CFAW membership while also increasing external awareness to other related organizations in the Washington, DC area. More specifically, the Society plans to increase its advocacy engagement and play an active role in raising financial literacy in the Washington, DC community.
- Enhance Infrastructure
CFAW must continue to strengthen organizationally. This includes ensuring it can attract the appropriate level and number of staff, ensuring the Board of Directors and committee leaders are well oriented and prepared to perform their roles, and that the Society is looking forward and planning for the next generation of leaders while adequately prepared for the potential disruptions in operations.
- Increase Sponsorship
CFAW seeks to strengthen relationships with existing sponsors while continuing to develop new relationships with other firms and organizations. By improving the sponsorship benefits and working with each sponsor individually, the goal is to create win-win opportunities that increase the level of sponsorship and ultimately benefit the CFAW membership community.