

## FY 2018 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 2017. The CFAW Board of Directors will review this plan regularly, or as determined by the Board Chair, and measure the society's performance against these strategic goals.

### Mission Statement

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

### 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.

### Vision

- CFAW is 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.
- CFAW members across all demographics and industries are engaged and participate actively in Society activities and sharing their time and expertise in support of the organization's mission, goals, and objectives.
- CFAW members have meaningful opportunities for education, development of substantive professional relationships and dialogue.
- The value of the CFA charter is known by employers, investors, and the local community.
- CFAW operates as a premier membership association and as a prudent steward of society resources.

## Strategic Goals

- Engage the CFAW Member Community  
CFAW emphasizes its goal to engage more members more meaningfully, and to create a culture where CFAW members feel like part of a community. We seek to promote community-building activities that are organic, self-sustaining, and leveraged. In other words, CFAW wants to promote community-building activities that are conceived of and led by the members themselves rather than by staff.
- Strengthen External Relationships  
CFAW seeks to develop relationships with a broader set of external organizations, and strengthen its existing relationships. Target organizations include CFA Institute, other professional groups (including those not directly related to the financial services industry), local employers, thought leaders, and potential sponsors.
- Continue to Increase Operating Capacity  
CFAW must continue to strengthen organizationally. This includes ensuring it can attract and retain qualified staff, systematizing capabilities, and developing the assets that CFAW needs to run effectively, such as technology and marketing collateral.