Working Team Annual Plan: Lifelong Learning
Working Team Aim: High Quality chapter events relevant to CFP® and associated professionals that support the 4 FPA membership value pillars: Professional Development, Business Success, Community and Advocacy, and directly support the Vision and Mission of the chapter.
Working Team Members: Team Leader: Jim Schwartz
Members: Bill Millico, Robyn Gerke, Mike Goyarts, Dale Walters, Bill Parker …

	Planned Activity	Staff, Board or Organizational Support Needed	Frequency /Timeline	Responsibility	Smart Goal • **S**pecific (who/what/where/when/which/why) • **M**easurable (what metric?) • **A**chievable (baby steps) • **R**elevant (Visions/Mission/Directives) • **T**imebound (which month, quarter, or by year end)	Budget Amount Requested
1	Monthly Team conference calls	Reserve UBER	1x monthly	Team leader	Have an agenda, capture Action Items, share and assign the work load, complete all planning 6 mo's ahead of event date. Goal: each team member has 1 assignment, approx. 1 hour/mo of time to complete.	UBER ACCESS
2	An Active Diverse Team	MK or SW support with Membership Directory and inquiries of interest	continual	Current Team	No less than 6 members by 12/31, with an identified team leader for the next year.	-0-
3	Plan and produce 3 quarterly Super CEvents	Exec Director/admin	Feb, May, Nov	Per assignments	Prior Quality metric was overall Survey Monkey satisfaction rate >=4.75. Suggest/Develop for 2018 Metrics that Matter, migrate to Kahoot responses Attendance goal >= 25% of membership Financial goal = Quarterly CEvents break even for the year.	Cash flow. Revenues equal to expenses. Marketing and registration support. $1000 for CE
4	Plan and produce 1 Symposium annually	Exec Director/admin	Sept	Per assignments	Set a relevant theme, produce an event specific budget, target attendance as the highest attended event for the chapter for the year. Seek input from other working team re: how Symposium helps them, and how they can support Symposium	Cash Flow. Per Chapter Budget. 2018: next profit of $3,900
5	Plan and produce at least one chapter event 10 out of 12 months of the year	Exec Director/admin	Off months	Per assignments	Combination of Workshops, Field Trips, or social events. Ideally collaborative with other working teams or organizations.	Cash flow. Revenues equal to expenses
6	Host at least one working team shirtsleeves meeting at/before a chapter event	admin	any	Per assignments	Live, face to face, working team meeting intended to build/strengthen team relationship, recruit new people, showcase community within the chapter	$25 (snacks)
7	All Team Members call in to 1 Monday Hubble conference call per quarter	-	1x per quarter	all	1x every 3 months, their choice of date	-0-

FPAGP 2018 Dtd May 2018