



# Portland IMA Chapter 2007/2008 Goals and Projects

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# Overall Goals

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- Vision

- To be Portland's leading association for management accounting and finance professionals

- Mission

- To provide world class opportunities for management accounting and finance professionals to advance their careers through professional education, networking, certifications, and professional advocacy while promoting the highest ethical standards



# Problem Areas to Address

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- Flat to declining meeting attendance
- Lack of student involvement
- Little participation from major employers with large numbers of finance professionals
- IMA not perceived to be the premier forum for networking



# Areas Not In Crisis

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- Financials
  - Our funds have increased this past year
- Absolute number of members in the Portland Chapter
  - We have one of the largest chapters in terms of absolute members
- Board participation
  - We have been able to fill all our slots, but should note that our bench is weak



# Goals and Projects Process

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- Development of a limited number of key objectives
  - Need to keep it simple and focused – we can't solve everything in one year!
- Goals and projects to achieve objectives tracked via a balanced scorecard
- Projects have owners assigned
- Projects worked during summer months
  - Exact project plans completed and presented to board by August board meeting



# Goal Summary

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- Balanced budget & funded initiatives
- Increase meeting attendance by 25%
- Increase attendance from top 3 area employers
- Increase networking opportunities
- Increase student participation
- Win national competition
- Flawless chapter operations
- Scholarship program
- External visibility and communications for Portland Chapter

2007/2008 Portland IMA Chapter Scorecard

Area	Strategic Objective	Measurement	Programs	Notes from Planning Session	Suggested Owner		
Financial	Balanced Budget	Spending vs. Budget	Budget in place by xxx	Currently have a balanced budget	Don		
Customer	Increase meeting attendance by 25%	# of attendees at meetings	High quality speaker program in place by end of summer	Each board member find 2 potential speakers.	Gloria Braunschweig		
			Phone plan - every member is called once during the year. New member welcome program	Phone plan defined.		Kristen/Tracey	
	Increase meeting attendance from top 3 Portland area employers (Intel, Nike, Tektronics) by 25%	# of attendees at meetings from top 3 employers	Networking program for each meeting	Each chapter meeting will have a specific networking enhancement program	Raynette		
			Non-Meeting social event	Christmas social party and CMA honor night	Veda		
	Increase student participation	# of students attending chapter meetings	Chapter meeting at top area employer	Reviewing options for site chapter meeting - in progress	Russell		
			IMA visit to at least one top area employer	Like to target a visit to two large firms to discuss IMA support and involvement	Russell & past presidents		
Business Process	Win National IMA chapter competition	Monthly performance score from National	CMA review course in place	Need to have another CMA exam course in place for this year to encourage CMA. Define new chapter sponsored course for spring	Ted		
			Manuscript submission	Call for papers and request from universities	Russell		
		Status on specific programs	Charitable event	Food bank donation program and OPB phone bank	Ken Rhonnye/Don		
			Publish annual roster	Don and Rhonnye. Recommended to advertise roster on web site and in post card mailing end of summer. Members may request soft copy or pick up			
			Hold a chapter management session	Tentative for Oct, provide member training and information on IMA and CMA	Russell		
			Guest presentation on CMA/IMA in classroom	Mike L. continued support. Russ to present IMA/CMA to students	Mike L.		
	Flawless Chapter Operations	All activities completed per schedule	Best in class website program	Gloria to try to obtain another Microsoft ad and support website development	Gloria		
			Board roles/activities	Tracking progress of programs	Veda		
			Continue scholarship awards to assist in chapter participation	# of scholarships awarded	Scholarship funding and communication plan	We have tentatively budgets \$750 for this program. Like to target students for scholarships rather than corporate employees. Advertise during classroom visits	Ted Takamura
					Obtain high visibility for Portland Chapter	# of communications/press releases	Communications & press release program



# Next Steps

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- Approval of strategic plan
- Development of projects
  - Project plans completed by August BOD meeting
- *Note: strategic plan was approved by the board at our May meeting*