



Team Leadership System



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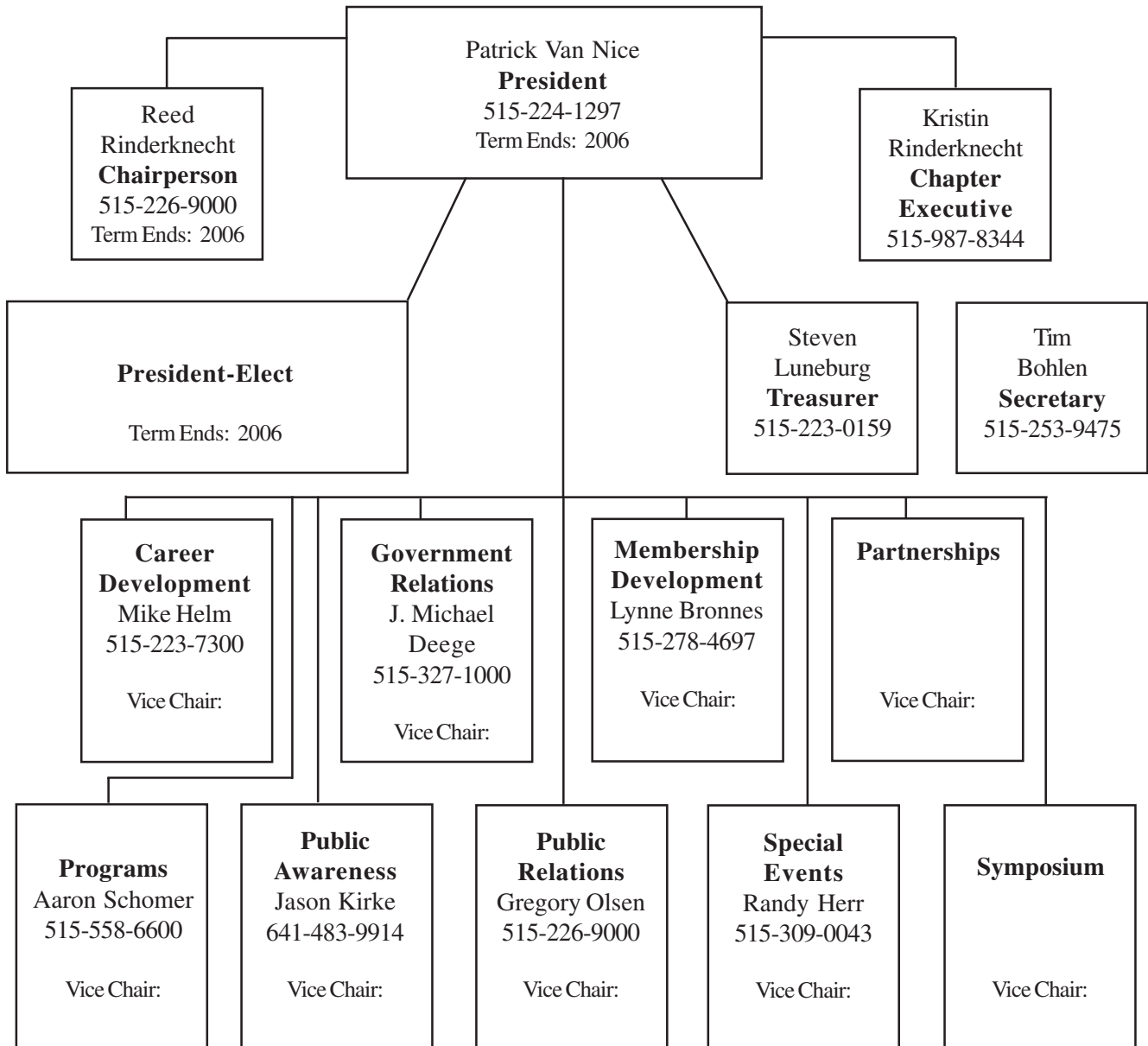
**The Financial Planning Association
of Iowa**

15130 New York Circle
Clive, IA 50325
www.fpaiowa.org
(515) 987-8344 Chapter Executive
1 (800) 322-4237 National FPA Members' Line
1 (888) 806-7526 FPA General Information
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TABLE OF CONTENTS

Team Leadership System

Board of Directors - Year 2006	1
Iowa's Profile & Mission Statement	2
Program Schedule	2
National's Aim, Objectives and Core Values	3
Code of Ethics	3
Introduction to Leadership System	4
Leadership Doctrines	5
Six Steps of the Team Leadership System	8
Career Development	8
Government Relations	9
Membership	11
Programs/Education	12
Public Awareness	13
Public Relations	14
Special Events/Symposium	15
Five Year Practical Vision	16



FPA PROFILE:

The Financial Planning Association (FPA®) is the membership association for over 28,000 CFP® professionals, financial planners, specialists and organizations dedicated to advancing the financial planning process. FPA of Iowa is a dynamic association with over 180 members. FPA believes that everyone needs objective advice to make informed financial decisions and that when seeking the advice of a financial planner; the planner should be a CERTIFIED FINANCIAL PLANNER™ licensee. Our members are committed to honesty, integrity, and open communication. Through the spirit of service, we foster stewardship and the development of recognized knowledge and competence.

IOWA MISSION STATEMENT:

The mission of the Financial Planning Association of Iowa is to facilitate the success of our members in accordance with the highest ethical standards by providing education and leadership for financial planning professionals and the public we serve.



FPA - THE HEART OF FINANCIAL PLANNING™:

The community that brings together those who deliver, support and benefit from financial planning.

WHO ARE OUR MEMBERS?

The Financial Planning Association members include Financial Planners: CFP certificants and other professionals who have made a commitment to the financial planning process. All members are encouraged to pursue and attain the CERTIFIED FINANCIAL PLANNER mark. Allied professionals include accountants, attorneys, bankers, charitable giving specialists, insurance agents, investment consultants and others who advance the financial planning process in their work with clients. FPA’s Corporate membership consists of firms who have products and services that are appropriate for financial planners as well as financial planning broker-dealers who find value in having access to other Corporate members as well as to FPA’s individual members.

IOWA PROGRAM SCHEDULE

- March 14, 2006 1031 Exchange with Presenter Dave Nitz - Triple Net Properties
- April 18, 2006 Beyond the Numbers - How Clients and Their Financial Advisors Can Ask the Right Questions with Presenter Dr. David Lazenby - Scenario Now
- May 16, 2006 Options and Investing with Presenter Dr. Gary D. Koppenhaver - Iowa State University
- June 20, 2006 Identity Theft with Presenter Travis Acheson or Rita Perea
- September 15-17, 2006 FPA Chapter Leadership Conference, Denver CO
- September 19, 2006 Luncheon - To Be Determined
- September 19, 2006 Code of Ethics Continuing Education - 2 hours with Presenter Dan Candura - Candura Group
- October 2-8, 2006 Financial Planning Week
- October 17, 2006 To Be Determined
- October 21-24, 2006 FPA Nashville 2006, National Conference

Future updates will be posted at: <http://www.fpaannualconvention.org/>

NATIONAL'S CORE IDEOLOGY:

Primary Aim: The financial planning profession exists to help consumers make wise financial decisions to achieve their life goals. FPA™ benefits the public by helping to ensure that financial planning is delivered through competent, ethical financial planners. FPA is the community that fosters the value of financial planning and advances the financial planning profession.

Core Values: At FPA, our core values are who we are. They describe our intended state of being. They are so integral to our being that we would not abandon them even if we were penalized for holding them. They are values of FPA, and we want to attract as members those who share our values.

- **Competence:** Our dedication to competence requires not only lifelong learning, but also that we continually assess our ability to appropriately and effectively address the needs of those whom we serve.
- **Integrity:** We strive to have ever more congruence between our words and deeds, and to deliver genuine value to those whom we serve.
- **Relationships:** We are committed to open, inclusive and respectful relationships, including collaboration among diverse parties on common interests.
- **Stewardship:** We recognize our responsibility to act with vision, ever mindful of the effects of our actions on the future.

FPA's objectives are timeless end states we will strive for in order to achieve our primary aim:

- Unify the voice, focus and resources of the financial planning community.
- Grow the organization by bringing together those who champion the financial planning process.
- Cultivate the body of knowledge of personal financial planning.
- Advance brand awareness for professional financial planners, building the CFP® credential as the hallmark of the brand.
- Define and effectively communicate a common understanding of the discipline of personal financial planning and the benefits of its use.
- Facilitate the success of our members.

CODE OF ETHICS:

This Code of Ethics is an expression of the financial planning profession's recognition of its responsibilities to the public, to clients, to colleagues, and to employers. These principles apply to all Financial Planning Association (FPA) members and provide guidance to them in the performance of their professional services.

Principle 1 - Integrity

An FPA member shall offer and provide professional services with integrity.

Principle 2 - Objectivity

An FPA member shall be objective in providing professional services to clients.

Principle 3 - Competence

An FPA member shall provide services to clients competently and maintain the necessary knowledge and skill to continue to do so in those areas in which the designee is engaged.

Principle 4 - Fairness

An FPA member shall perform professional services in a manner that is fair and reasonable to clients, principals, partners, and employers and shall disclose conflict(s) of interest(s) in providing such services.

Principle 5 - Confidentiality

An FPA member shall not disclose any confidential client information without the specific consent of the client unless in response to proper legal process, to defend against charges of wrongdoing by the FPA member or in connection with a civil dispute between the FPA member and client.

Principle 6 - Professionalism

An FPA member's conduct in all matters shall reflect credit upon the profession.

Principle 7 - Diligence

An FPA member shall act diligently in providing professional services. Diligence is the provision of services in a reasonably prompt and thorough manner. Diligence also includes proper planning for and supervision of the rendering of professional services.

Introduction

**Leadership development and training provided by:
A. Lynn Scoresby & Associates • 800-526-7793
www.leaderstoolkit.com**

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Leadership

In our current and future world, we believe that real and successful teams are being organized to create new products, practices, and programs. Teams are being used to redesign organizations, develop new business practices, and implement them. It is becoming a more common practice for companies to place their upper executives into executive teams to improve overall communication and effectiveness. The fact that teams and teamwork have been around a long time and that this practice is getting even more attention stimulates much study fueled by the need to understand how to make teams the most effective and productive. We offer a straightforward answer to this need. Successful teams result from good leadership and good leadership is much more than putting people in the same room, giving them an assignment, scheduling meetings, and calling them a team.

High-quality leadership, however, is neither a natural ability that one inherits nor a lucky combination of good people put together. Good leaders demonstrate a set of skills based on real knowledge about teams and leadership, artfully applied in a very unique setting of people working closely together where high performance requires a level of cooperation and trust seldom achieved elsewhere.

We believe the objective of any team should be to accomplish so much it qualifies to be called a high performance team. High performance teams produce extraordinary results because team members are individually effective and work with one another in ways that expand and enlarge each individual's contribution. This seminar is designed to teach you how to develop and apply such extraordinary leadership.

Leadership Doctrines

Consider these statements of “leadership doctrines.” These doctrines are integral to a general theory of leadership. They lead to principles that define the effective process of leading.

1. Leaders Activate the Freedom to Choose

Human beings are the most intelligent of all creations and are uniquely and inherently free to choose. Even though some people may resist freedom and the responsibility which comes with it, they achieve more and sustain their performance better when their freedom is activated by those who lead them. Leaders who activate the freedom to choose use the inviting words, “will you?” rather than “you will.”

2. Leaders Create Accountability and Responsibility

Leaders create accountability and responsibility by involving others in setting goals and developing plans. Along with their option to choose, people have some measure of power in pursuing and achieving their goals, to act and not only be acted upon. Accountability and responsibility are greater when leaders involve those they lead in developing the means or methods of achieving and measuring the results.

3. Leaders Motivate and Inspire by Establishing High Standards of Performance

People generally have goals to preserve and enhance life, liberty, and the pursuit of happiness. They are more motivated and inspired to achieve when leaders establish high standards of performance and link them to followers’ individual goals and objectives.

4. The Power of Leadership is Shared with Those Who Are Led

The choices of one person are tempered by the choices of others, thereby restricting the ability to act unilaterally or to stop others from acting even where there is enough time and there are enough resources to spare. Coercion, threat, or any other form of excessive control may temporarily move people to act but eventually will diminish their willingness to achieve.

5. Leaders Bring People Together in a Common Cause

People voluntarily align themselves with others to increase the power to achieve their goals when there is a possibility for all to agree on a common vision and strategy. Performance is accelerated when leaders take advantage of people's willingness to join with others in a common effort.

6. Leadership is Based on the Integrity and Moral Character of the Leader

People follow those whose moral character they trust and whom they judge will be beneficial in their lives without loss of power to choose and act. All achievement begins as a belief in leaders whose personal lives exemplify integrity.

7. Leaders transform People and Organizations

Leaders, allies and followers exchange power and influence as stewards of resources and opportunities, transforming their lives and circumstances to the end that all participants benefit. Effective leaders forthrightly identify personal and organizational changes that must be made to accomplish new levels of achievement and willingly change themselves.

8. Leaders Find and Prepare Other Leaders

Leaders extend their influence by organizing and institutionalizing the role of high-quality leadership which includes finding and nurturing other leaders who in turn help to transform those people and organizations they serve.

Team Leadership System

- **Fostering Trust™**

Trust is the intangible bond between leader and follower that is the basis for all leadership.

- **Creating Vision Trust™**

Vision is a view of the future people create themselves or accept from others. A vision presents risk and requires sacrifice but excites and inspires.

- **Developing Strategy™**

Strategy is the essential plan which focuses and organizes the work of achievement. It links effort to outcome by bringing people and resources together, dividing the work, forming sequences of performance, establishing accountability, and giving meaning to responsibility.

- **Energizing Alliances™**

Personal and organizational achievement typically result from the joined efforts of people who forge alliances based on the belief that efforts to achieve will produce mutual benefits; skill at creating alliances is basic to success.

- **Activating Transformations™**

Changes in individual performance and changes in organizational practice are necessary to achieve new results. Facing change forthrightly is part of successful leadership.

- **Measuring Progress, Achieving Results, and Resetting the Vision™**

Actively measuring progress maintains focus and permits course corrections before time runs out.

**STRATEGIC PLAN SUPPORTING ACTIONS FOR
CAREER DEVELOPMENT COMMITTEE - YEAR 2006**

Mike Helm
Director

Fostering Trust - Leadership Attributes

- Create the Vision
- Set the expectations
 - Ask for volunteers for tasks
 - Get agreement on the completion
 - Get agreement on the end result
 - Expect the task to be complete
- Always have an agenda
 - Distribute agenda ahead of time
 - Set the length of the meeting and adhere to that time
 - Consider non-traditional meetings
 - Minimize the number of meetings
- Tell what I will do. Do what I tell.

Vision:

We are a proactive center to make a career in financial planning attractive and achievable.

Developing the Strategy:

- Vital Few
 - Create an awareness of FPA as a method of Career Development
 - Make alliances with higher education
 - Provide educational opportunities
- Provide mentorship/internship opportunities
- Critical Success Factors
 - Work with other FPA committees to create an excellent career development program
 - Sponsorship
 - Membership
 - Program
- Identify your allies
 - Other FPA committees
 - Iowa State University College of Business
 - Iowa State University College of Family and Consumer Science
 - Keir Educational Resources
- Provide classes for the comprehensive CFP® exam

Energizing your allies:

If FPA committees work together we will all realize bigger achievements:

- Iowa State University Colleges will:
 - Have opportunities for student mentorship and internships
 - Job possibilities
 - Opportunity to recruit FPA members to their Masters and MBA programs
- Keir will have the profitability from the classes

STRATEGIC PLAN SUPPORTING ACTIONS FOR GOVERNMENTAL RELATIONS COMMITTEE - YEAR 2006

Fostering trust:

Begins with clear and open communications, with a detailed understanding of expectations.

Vision:

Our vision is to help our members build and maintain a practice based on the highest professional and ethical standards. We will communicate effectively with all of our constituents, including our members, the public, financial services industries, legislators, and regulatory bodies. We will influence legislation that affects the interests of our members and their constituencies.

Developing Strategies:

Our strategies may include providing educational resources that help to implement our vision.

To solicit membership for additional committee members to help in the implementation and the ongoing process of development

Tactics:

- One-on-one requests for assistance
- Announcements at monthly meetings
- Advertisements in monthly newsletter
- Request for volunteers in Grass Roots Survey

To communicate to members concerning legislative and regulatory issues

Tactics:

- Monthly newsletter will contain an article pertaining to our committee
- Blast emails on an as-needed, urgent basis
- Update website committee page to include hot issue bullet-points
- Continuous one-on-one contacts
- Conduct a survey of the membership annually to confirm vision and direction of committee
- Emails to persons who function as District Representatives out-state
- Encourage members to support FPA's political action committee (PAC)

To provide educational resources to our members

Tactics:

- Presentation of Code of Ethics courses
- Newsletter articles

To develop mutually beneficial relationships with allied associations

Tactics:

- Identify relevant associations
- Foster and develop relationship with the State of Iowa Department of Commerce
- Foster and develop relationships with allies likely to support the FPA of Iowa agenda

To raise awareness of the financial planning process and profession

Tactics:

- Solicitation of gubernatorial and mayoral proclamations

**STRATEGIC PLAN SUPPORTING ACTIONS FOR
GOVERNMENTAL RELATIONS COMMITTEE ... Continued**

To enable our members to effectively communicate and be a source of influence to legislators

Tactics:

- Arrange a 'lobbying tips' speaker meeting each year
- Attend a lobbying seminar and publish a summary for the membership

To develop the capability to influence legislation and rulemaking

Tactics:

- Continue securing home addresses and legislative districts of members
- Encourage members to take their representative to lunch
- Identify offending laws and rules and propose solutions
- Continue contact with Greg Goettsch of the Iowa Insurance Division
- Introduce the members to the Jump Start we site and establish on-going intent and cooperate with National Government on Economic Education
- Coordinate with other appropriate committee programs for the development of financial education of youth in our secondary schools
- Consider an Iowa Jump Start web site sponsored by our association
- Consider creating a financial education seminar or classes for adult Hispanics living in Iowa
- Designate one of the committee members as vice chairperson responsible for monitoring legislative and regulatory activity in the State of Iowa; and monitor national legislation by utilizing FPA Resources.

Energizing Alliances:

We will identify and contact likely allies, partners, constituents, legislators and regulators.

Tactics:

- Begin periodic e-mailing of monthly newsletter to media, Presidents of other Chapters, and CFP's who are not yet FPA members
- Identify further contacts where mutual needs and agenda are likely
- Utilize guest passes to invite allies to our monthly meetings
- Continue and expand internal communications with our Board and other Committees, and expand external communications to the accounting and legal professions, among others
- Estimate and communicate the value we add to such alliances
- Form an active committee consisting of at least four members, each with specific assignments.

Measuring Results:

We will be accountable for completing our commitments

Tactics:

- Begin clear and open communication with our Committee
- Begin to assign specific tasks with time deadlines to specific persons
- Measure our results on a quarterly basis

STRATEGIC PLAN SUPPORTING ACTIONS FOR MEMBER SERVICES COMMITTEE - YEAR 2006

Fostering Trust:

Communicating in a transparent way to members by managing promises through developing measurable strategies. We will use open communication to help cultivate and give feedback on strategies, be action-oriented when implementing them, and be accountable to each other and what we have set out to accomplish.

Creating the Shared Vision:

A primary objective of the Membership Committee is to build and retain membership through services and opportunities that provide a sense of community and connectedness to the members of the FPA of Iowa. We will actively and effectively communicate the benefits of membership to the Minnesota financial planning community, in order to increase the number of new members in the chapter.

Developing Strategies & Measuring Results:

- **Recruitment** - Activate current members to get non-members to join and direct recruitment of non-members. Committee members shall speak at chapter meetings about new incentives and the main reasons for joining the FPA, which include networking, CE and practice management. Have members talk to co-workers. Make benefits of FPA fact sheets available to members at monthly meetings.
- **Buddy System** - Welcome new members each month via individual email with member benefit attachment. Encourage new members to explore the web site, especially the Members Only section by explaining how to use this helpful feature. Follow up email with a phone call to new member to see if they have any questions or need a veteran member to meet with them to answer questions. Goal: retain 5% of new members typically lost each year.
- **Member Benefits** - Provide discounts to services and events on our Members Only Section in addition to our monthly newsletter.
- **Community Practice Groups (CPG)** - Establish Community Practice Groups (CPG). The CPG will provide an opportunity to meet with other professionals to discuss topics and practices of financial planning. Provide an opportunity for members to join smaller financial planning communities within FPA of Iowa. More details are in the Members Only section.
- **Resource Program** - Establish the Resource Program, which will provide “specialized” assistance from other professionals to assist in the practices of both experienced and inexperienced financial planners. This allows experienced planners and allied professionals to network together to brainstorm client issues and problems.
- **Practice Management Forum** - This program will work in conjunction with the Program Committee to provide for an annual forum. These are non-CE programs, but provide for extensive knowledge of a certain topic that interests current FPA of Iowa members. These meetings would provide for more personal one-on-one time after the main speaker discussion to help put what you have learned into practice.
- **Special Events** - Provide opportunity for members to network and meet one another.

Energizing Alliances:

We will need to draw on a number of different alliances in order to be effective. These include inside alliances of: Programs Committee, Symposium Committee, Member Services Committee, Career Development Committee, the Chapter Executive and Interns. Our outside alliances will include allied associations and educational institutions.

Activating Transformations:

We will be able to energize and focus the talents of the Membership Committee by meeting on a monthly basis in person at a pre-selected date and time. Each strategy will be assigned to specific member(s) of the Membership Committee to promote ownership and help in the management of making sure the “job gets done.”

Measuring Results:

- Measure the retention of FPA MN members at the beginning of each year compared to the prior year.
- Evaluate and act on the answers and feedback from member surveys.
- Quantify participation levels and growth in participation in events that are offered and attended.

STRATEGIC PLAN SUPPORTING ACTIONS FOR PROGRAMS COMMITTEE FOR YEAR 2006

Fostering Trust:

Frequent and scheduled communication will allow each committee member to accept and accomplish specific tasks that they have agreed to accomplish. Committee chair will also accomplish and report on specific tasks agreed to and accomplished.

Creating the Shared Vision:

We will help fulfill the Iowa chapter's mission by creating programs which foster competent committed and ethical members; provide education and networking opportunities; assist members in achieving professional and personal fulfillment.

Developing Strategies:

We will achieve this goal by building and retaining a growing membership through high quality programs that call on both local and national speakers to educate and motivate members. Scheduling a session may be based on a strong topic or a strong speaker. If the main draw is the speaker, the topic must still have some relevance; if the main draw is the topic, the speaker must still be of high quality. Through high quality programs, we will draw additional members.

Energize your Alliances:

Internal allies are other committee, board and FPA members. External allies are university professors, department heads, authors, bankers, money managers, economists, etc. We will call on each to provide the highest quality speakers available to our chapter.

Activating Transformations:

Each committee member is responsible for facilitating and coordinating two topics per meeting based on outcome of initial brainstorming session where topics were identified. As a committee, we have emphasized the need to research speakers' ability and experience. Committee members' responsibilities include communication with the presenter prior to the meeting, as well as on-site coordination of the entire program which includes helping with audio/visual equipment, greeting the speaker(s), confirming appropriate number of chairs, regulating room temperature and assisting with distribution of materials.

Achieving and Measuring Results:

Increase attendees by end of 2006. Use meeting surveys to measure the effectiveness of the presentations.

STRATEGIC PLAN SUPPORTING ACTIONS FOR PUBLIC AWARENESS COMMITTEE FOR YEAR 2006

Foster Trust:

The Public Awareness chair and committee members inspiring trust in each other and then in turn inspiring trust from Chapter members – allowing everyone to come together and promote their shared vision.

Creating the Shared Vision

To assist the public in recognizing the value of financial planning and financial education to achieve their goals and dreams. Working with local community groups and our chapter membership to effectively help with the public's financial planning needs.

Developing Strategy

- Getting started and promoting the FPA of Iowa's program to offer pro-bono financial planning assistance for people in the Central Iowa community
- Starting a Speakers Bureau made up of FPA of Iowa members for the purpose of sharing with local groups the message of financial planning and the work that the FPA of Iowa is doing
- Becoming an active participant in the National Financial Planning support Center – to respond in time of crisis and providing assistance to families, individuals and businesses
- Becoming an active participant in the National Financial Planning support Center – to respond in time of crisis and providing assistance to families, individuals and businesses
- Promote the "Planners Search" service available on the FPA's web site
- Exhibiting at public events to promote our FPA chapter and the benefits of working with FPA members.
- Working with the Jump Start Coalition and the National Endowment for Financial Education (NEFE) to increase financial education in our K-12 schools
- Increasing communications with allied professional organizations and inviting them to participate in the FPA of Iowa as members and to share information in each others newsletters

Energize Alliances

- Work with local non-profit service organizations
- Partnering with local allied professional organizations
- Working with FPA National and the National Financial Planning Support Center
- Helping Local area elementary and secondary schools and teachers
- Promoting the Speakers Bureau with companies, civic groups, and organizations interested in hosting a financial planning speaker
- Working with the FPA of Iowa's Public Relations committee for help in communicating to the media the service work the FPA of Iowa is doing in the community.

Activating Transformations:

(To be completed)

Measuring Progress, Achieving Results and Resetting the Vision:

(To be completed)

STRATEGIC PLAN SUPPORTING ACTIONS FOR PUBLIC RELATIONS COMMITTEE FOR YEAR 2006

Fostering Trust:

The Public Relations chair and committee members inspiring trust in each other and then in turn inspiring trust from Chapter members – allowing everyone to come together and promote their shared vision.

Creating the Shared Vision:

To assist the public to recognize the value of financial planning to achieve their goals and dreams. Working with the local media and our chapter membership to understand how to effectively communicate this vision to the public.

Developing Strategies:

- Formation of new and separate Public Awareness committee for promoting financial planning and the FPA of Iowa directly with the public.
- Distributing Public Service Announcements and Financial Planning Perspectives articles for the broadcast and print media to use – increasing the public’s awareness of financial planning.
- Offering opportunities for members to submit articles for national publication through FPA National’s public relations team.
- Establishing and keeping strong relationships with members of the local media.
- Creating and sending out media kits for the purpose of promoting our FPA chapter as a resource for personal finance coverage.
- Developing and maintaining a list of Chapter members and their specialties for the purpose of the media being able to call on them when financial planning information is needed.
- Promoting Financial Planning Week by obtaining proclamations; chapter members being on television, print and radio; and using advertising.
- Continuing to work with the Des Moines Register in their Money Makeover series
- Working with the Symposium committee to promote the FPA to allied professionals.

Energizing Alliances:

- FPA of Iowa members who participate in the Money Makeover series.
- Local TV & radio stations
- Local print media including the Des Moines Register (Esp. Steve Dinnen – the Register’s personal finance reporter) and the Des Moines Business Record.
- The Governor of Iowa’s office and local governments for help in issuing proclamations for Financial Planning week.
- FPA of Iowa members who wish to be a part of a media contact list for help in answering questions for financial planning stories and articles.
- The FPA of Iowa’s new Public Awareness committee for help in communicating to the media the service work the FPA of Iowa is doing in the community.
- The FPA of Iowa’s Executive Director for help in working with the media and chapter members.

Activating Transformations:

(To be completed)

Measuring Progress, Achieving Results and Resetting the Vision:

(To be completed)

**STRATEGIC PLAN SUPPORTING ACTIONS FOR
SPECIAL EVENTS COMMITTEE FOR YEAR 2006**

Fostering Trust:

Creating the Shared Vision:

Developing Strategies:

Energizing Alliances:

Activating Transformations:

Measuring Progress, Achieving Results and Resetting the Vision:

**STRATEGIC PLAN SUPPORTING ACTIONS FOR
THE SYMPOSIUM - YEAR 2006 and SPECIAL EVENTS**

Fostering trust:

- Set open lines of communication
 - Between committee members
 - Between committee and Board of Directors
- Email regular update sharing the progress of the committee to each committee member

Vision:

To provide an educational experience that will meet the varied needs and interest of our membership

Developing Strategies/Energizing Alliances/Measuring Results:

- Vital Few – Establish cost programming and costs of facilities (set a budget)
- Critical Success Factors
 - Location and Dates
 - Programming – speakers, tracks, breakouts, workshops
 - Exhibitor attendance
 - Membership attendance
 - Continuing Education
 - Promotion
- Allies
 - Internal – Primary: Partnership Committee
 - Internal – Secondary: Programs Committee, Member Services, Leg/Reg Committee, PR Committee
 - External
- Partners
- Professional Association/Groups
- FPA – National

Energizing Alliances & Measuring Results:

- Individual meetings with the committees to share the mission/vision of Symposium 2006
- Solicit help in putting program together; input from membership on topics and speakers

Measuring Results:

- Goal of 100 attendees
- Evaluation review
- Email bi-weekly updates and information
- Monthly progress reports – financial and programming

	By Whom	When