

Chapter Whitepaper

“Chapters & the LCPA: Aligning for Success”

PURPOSE

The LCPA's Strategic Planning Committee meeting in 2007 determined that the Society should undertake a review of the Chapter structure. The following questions were raised by the committee:

- *“What do we, as a Society, expect from a chapter?”*
- *“What services should the chapter provide to local members?”*
- *“What would a ‘model’ or ‘successful’ chapter look like?”*

Also, once that model was developed, *“How would their success be measured?”*

APPROACH

As a result of the committee's discussion, the LCPA staff held three facilitated discussions with Chapter leadership. The separate discussions were with 2008-09 (1) immediate past chapter presidents, (2) current chapter presidents, and (3) chapter presidents-elect.

A description of the structure of the discussions is as follows:

- Each chapter officer was asked to write what they believed their respective chapter's mission statement to be, and a group discussion of those mission statements followed.
- Building on the group's collective top five mission issues, each chapter officer was asked to write their “how-to's” (goals) to accomplishing their stated mission, and a group discussion followed.
- Based on the goals identified, each chapter officer was asked to write the general challenges they may face in achieving the goals listed, and a discussion followed.
- The discussion concluded with officers identifying their personal best take-away idea, thought or realization.

Attached to this document is a more detailed outline of the agenda. While the staff attempted to be consistent in the approach of the discussion, adaptations were made to accommodate the differing dynamics of each group.

SUMMARY

Attached are the results of the discussions which are summarized briefly below. However, it is recommended that you take time to review the attachment to gain a complete understanding of all of the missions, goals and challenges mentioned by the individual chapter officers.

A significant majority of the current year's chapter presidents and presidents-elect indicated that they believed the mission of their chapter was "to provide networking opportunities for its members and quality, inexpensive local CPE". An interesting observation was that following the initial exercise of drafting the mission statements, many then listed CPE as a "how-to", a means of accomplishing the mission of providing the networking opportunities, as opposed to CPE being the primary mission of the chapter as previously stated.

One notable realization to come from the discussion was that while they listed chapter CPE as a means of providing networking opportunities, they also acknowledged that the biggest challenge to achieving that goal was getting members to attend the CPE; therefore, is chapter CPE effective in accomplishing the networking mission? In addition to attendance, other CPE-related challenges mentioned included the difficulty of finding topics and speakers. Many alternate goals or means of accomplishing networking were mentioned and can be found in the attachment.



Based on the information gathered from the facilitated sessions, the staff offers the following thoughts for the Strategic Planning Committee to consider during its discussion of chapters:

There is no one definition of what makes a chapter successful.

Each chapter has its own unique strengths, challenges and demographics. To hold all chapters to the same benchmark would be unfair to the chapter board and its members. Therefore, the staff's recommendation is that a broad mission or guidance be developed to assist the chapters in becoming as successful as possible.

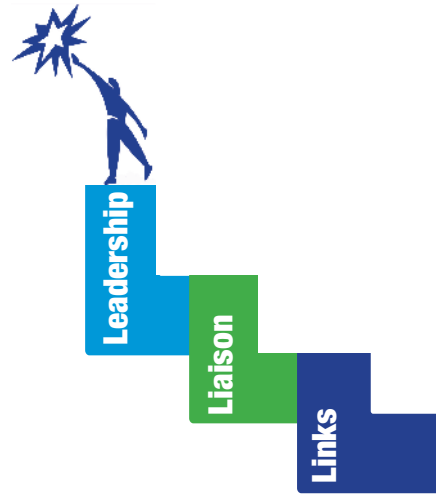
Most chapters felt their primary mission was to provide networking opportunities.

While this is indeed an important activity, the staff believes the mission should be elevated to a higher level. The mission should establish clear guidance for the chapters as a whole and be a vehicle for each chapter to develop a strategic plan. Therefore, providing networking opportunities would be a means to accomplish the mission instead of the actual mission.

PROPOSAL

To support a collective chapter mission which includes networking opportunities, the staff proposes the 3-L Model for Success.

- **Leadership**
Provide a leadership pipeline for future Chapter and Society leaders
- **Liaison**
Provide a liaison between the local Chapters and the State Society
- **Links**
Provide links to local organizations to promote the profession and enhance the CPA image



3-L Model for Success

LCPA & Chapters Aligned
to Serve Members Effectively

Under this model, chapters would evaluate each of their current and future programs to determine if its purpose supports one or more elements of the 3-L Model. Please note that success for these programs may not necessarily be measured by the number of attendees at an event. Instead, success could be determined by the number of potential leaders identified or the number of universities contacted in a given year. However, some events would be evaluated based on the number of attendees (eg. any meeting or social activity intended as networking event).

The staff believes the proposed model is attainable and measurable no matter the size or demographics of the individual chapters. In fact, several existing chapter activities already support the model. However, as demonstrated by the challenges enumerated by the chapters in the discussions, some of the current activities would need to be reevaluated in light of the new model and hard decisions made as to their viability.

The model encourages chapter boards and members to think outside of the box and look beyond what has traditionally been done (whether successful or not) and develop additional programs. Suggested activities can include:

- Outreach to local college and universities
- Leadership development at the chapter level
- Financial Literacy community events
- Other networking opportunities (Legislative Night, golf tournament, etc.)

It is worth noting that the components of the 3-L Model and its supporting activities reinforce and help to achieve all eight goals of the Society's Strategic Plan. The 3-L Model provides not only a framework for chapter success, but Society success as we join in a cooperative effort to accomplish our association's overall mission.

Finally, to support the model and hold the chapters accountable, the chapter reporting form used for LCPA Board meetings would be revised to reflect the concepts of the proposed model and enable each chapter to report on its progress and share ideas.

The Society staff pledges its support of the chapters in implementing and working to achieve the 3-L Model.

The staff believes the Model builds on chapters' strengths, mainly their connections at the local level, and encourages chapters to do what they can do best.

The Model helps to avoid a duplication of effort by the state society and the local chapters, thus utilizing everyone's resources more effectively.

