

Vision: The essential hub of our financial planning community.

Mission: Connect CFP® and financial planning professionals to the resources they need and the people who need them.

FPA Primary Aim: Elevate the profession that transforms lives through the power of financial planning.

Proposal Name:	<b>Partnership Platform: Adding a New Initiative</b>	Committee, Committee Chair, or Board member: Murray Smith (Director at Large)
Date Submitted:	February xx, 2022	Date Effective: Upon Board Agreement/Approval
Objective(s) of the Proposal	To gain board approval to proceed with a partnership initiative to enhance our partnership platform	
Rationale	<p><b>Partnerships are important, possibly critical, to the success of the chapter.</b></p> <ul style="list-style-type: none"> <li>• 13 partners (at time of writing) @ \$3,000 is \$39,000.</li> <li>• Partnership revenue represents ~50% of the approved 2022 budget.</li> <li>• Our partners provide education to our members via free CE sessions (via our “freemium” CE provision model).</li> </ul>	
Proposal	<p>To include a new initiative in our partnership platform. On the partner page of the website, partners will be able to upload a document outlining:</p> <ul style="list-style-type: none"> <li>• A summary of what they do and/or how they can help our community</li> <li>• Case studies to help our members/community see the partner in action.</li> </ul> <p>Phase II</p> <ul style="list-style-type: none"> <li>• Database of members who have used our partners and are open to being contacted by our community as part of said community member’s due diligence.</li> </ul>	
Pros	<ul style="list-style-type: none"> <li>• Provides partners additional opportunity to showcase their value to our members and community</li> <li>• Lisa Rehbarg has committed to help organize other partners and run the roll-out.</li> <li>• We further solidify our commitment to partners</li> <li>• We further differentiate our partnership platform</li> <li>• We highlight the flexibility of our leadership to adjust to partner needs</li> <li>• We highlight our process: this idea came out of a discussion at a partnership Huddle</li> <li>• Template is 90% developed.</li> </ul>	
Cons	<ul style="list-style-type: none"> <li>• The program requires additional support, mostly a webmaster, to assist Lisa Rehbarg with posting content to the website.</li> <li>• Further work required to finalize template.</li> <li>• Further work required to train administration (especially Phase II).</li> </ul>	
How this proposal supports our Vision and Mission.	<p>Vision: providing value in our win-win-win partnership platform helps the chapter acquire and retain partners. These partners are important to the chapter’s survival.</p> <p>Mission: Our partners are vetted through our unique and proprietary partnership platform. They are a large part of the resources we connect our members to, to assist them through their careers and financial planning ambitions.</p>	

[A Culture of Inquiry](#) is a critical element in successful board rooms and non-profit organizations. As a board member, when reviewing a submitted proposal, ask yourself the following questions before you vote:

Do I understand the proposal and its elements? Do I have any conflicts of interest with this proposal or any of its elements? Do I have any pre-disposed opinions or biases about this proposal or any of its elements? What information ISN’T here that would be beneficial to know? Do I believe the proposal is consistent with the organizations core values and supports forward motion toward the Vision and Mission?