

Our chapter just completed one of our most successful years!

1. Attendance was up 400% at monthly meetings over last year
2. We've had over 500 people attend our meetings and events
3. Our current trends are increasing
 - a. Our attendance was up over 800% in the last five meetings
4. 30% increase in membership (with help from the outside)
5. We're the largest chapter in the world
6. We've been able to start a number of new initiatives including reaching out to young professionals through student chapters and personally reaching out to hundreds of our members.



Keys to Our Success for the 2008-2009 Minneapolis Chapter Year

State of the Chapter Report:

Our Board of Directors worked hard to accomplish the organizational achievements which made our Minneapolis Chapter successful in 2008-2009. These included creating a vision, having a well-run organization, having quality and consistent communication, having quality and interesting speakers and topics, reaching out to our membership and business organizations to educate and welcome, and having a motivated, cohesive and quality Board of Directors.

Vision / Organization

A vision was established from the beginning

President's Vision (as stated on our website):

"I look forward to serving every member of the Minneapolis Chapter by placing a special emphasis on inviting exciting and interesting speakers to address relevant topics at our monthly dinner meetings, helping members by promoting education as well as networking opportunities within the Minneapolis Chapter, and educating companies about IMA and the CMA throughout businesses in the Twin Cities."

In addition to the President's Vision, we:

- Made sure activities were organized, timely, consistent, and well-run
- Created an atmosphere of being open, sharing, listening to ideas, and implementing as many ideas as possible
- Did not settle for sufficing (doing just enough to get by) but made sure to be on top of things and lead from in-front instead of behind
- Trying to personally connect with as many members as possible as well as connecting members with each other

Communication

1. Advertising - made sure advertising was timely and consistent, that it worked together, and that the different campaigns complimented each other. It was a concerted effort to bring quality content as well as quantity in a well-balanced way to our communication.
 - a. Email - Newsletters and other email communications were created with quality content that included special interest chapter material as well as advertising the speaker biography with abundant information
 - i. **Quality** – an email service was sought after in order to up-grade our capabilities and presentation
 - ii. **Quantity and consistency** – emails were delivered every other week on average; eight emails were distributed before the year began
 - iii. **Timely** – in addition to the regular communication of our events, emails were delivered one week before each event with registration information
 - iv. **Special** – emails were sent at Thanksgiving and Christmas
 - v. **Links** – in every email communication, there were links to different parts of our website (ex. registration, calendar of events, etc.)
 - b. Postcards
 - i. Two postcards were mailed before the start of the year as well as after the mid-year break listing speakers, topics, dates and our website address
2. Website
 - a. Up-to-date and accurate information was posted for all upcoming events
 - b. Included information on Board of Directors, link to IMA National, CMA information, job postings, vision statement, membership updates, meeting reservations, calendar of events with links to detailed speaker biography information, and feedback
 - c. It was easy to navigate and well-organized
 - d. Links were included on the website to guide our members to additional website resources
3. Dinner meetings
 - a. Made certain that our restaurant site and time was advertised consistently
 - b. Registration was made easy and straight-forward due to the links in our emails
 - c. Relevant information was included on tables such as:
 - i. Postcards advertisements for topics, speakers, and calendar of events
 - ii. Fliers for special events (MBEA, Conferences, Guthrie Theater Event, etc.)
 - iii. Business cards with contact information for IMA President (his picture was on all advertising materials which led to a sense of knowing someone who they could think of was the “face” of IMA)
4. Feedback
 - a. Responded to all feedback requests from the website
 - b. Answered all email inquiries
 - c. Addressed a variety of face-to-face situations
5. Outreach
 - a. Began the process of personally connecting with every chapter member by sending personalized letters, making phone calls, and talking to as many members as possible at the events
 - b. Reached out to students as well as young professionals by working on starting a number of student chapters at local business universities and colleges
6. Corporate Calls
 - a. Contacted a number of corporations to connect and advertise IMA through key members and individuals

7. Future Initiatives
 - a. Began the process of setting up more technology-based interaction from our chapter to engage a new generation of young professionals. We are looking into incorporating new technologies like Facebook, Linked-in, and Twitter.

Topics and Speakers

1. The topics and speakers were lined up for each month before we started the year
 - a. We had great topics
 - a. The topics were relevant to our members and included: IFRS, Generation Y, Ethics, XBRL, Mergers & Acquisitions, In-Sourcing and Out-Sourcing, SAP/ERP
 - b. We had quality speakers
 - a. They were among the industry leaders, experts in their fields, and from some of the leading corporations like 3M, Cargill, and Carlson

Dinner Meetings

1. We welcomed members and created a non-intimidating atmosphere
2. Made sure the energy-level was elevated at meetings
3. Adjusted dinner meetings details to ensure the meetings were well-run
4. Added drawings and raffles to create a fun and upbeat atmosphere
5. Created environment for networking to be successful
6. Increased networking was due to higher participation of members attending meetings
7. Presented information on current, local, and national news before meetings
8. Kept overall length of meeting time down by starting the presentation earlier in the meal
9. Rotated different nights of the week to give more members an opportunity to attend the dinner meetings
10. Honored past Presidents
11. Honored new CMAs
12. Created an atmosphere of openness and willingness to be there for members

Special Events

Guthrie Theater: included backstage personalized tour of their state-of-the-art facilities, dining at the Cue restaurant, performance of "Caroline or Change", as well as a question-and-answer session with the actors after the performance

Purpose

1. To host a quality, first-rate event that was unrivaled for its mass appeal in the Twin Cities
2. To create a fun and relaxed atmosphere where members could mingle with other members and their guests
3. To have an end-of-the year highlight for our members

Board of Directors

1. We had a board that:
 - a. Worked well together and was positive
 - b. Were willing to come up with new ideas and talk about what would work
 - c. Were willing to make sure new ideas were implemented and that there was follow-through
 - d. Were willing to re-evaluate and make changes continually that were needed
 - e. Were willing to listen and get feedback from our members on how to improve our group
 - f. Were organized and well-run
2. Created reports that were timely and accurate (treasury reports, required IMA National reports, minutes, attendance, registration, Regional Council report, etc.)
3. Initiated new by-laws for the chapter
4. Made sure that there was (as well as a perception) of strong leadership
5. Added additional, quality, as well as youth, to our board and committees

Knowledge

Kept up-to-date on:

1. Latest trends in organizations of our type
2. Latest trends in IMA chapters
3. How to adopt, assimilate, and implement ideas that work
4. National IMA issues
5. Regional IMA issues
6. National competition
7. IMA best practices and procedures as well as participation in teleconferences

Membership

After years of declining membership and major decline in participation and attendance at our monthly dinner meetings, this year we were able to successfully reverse that trend.

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2. Our current trends are increasing
 - a. Our attendance was up over 800% in the last five meetings
3. Increased 30% in membership (with help from the outside)
4. We have had over 500 people attend our meetings and events
5. We have had quality individuals attend our meetings, from CFOs and Vice Presidents all the way to entry-level accountants

Networking

1. Helped members find new career opportunities
2. Helped connect companies with individuals
3. Helped new out-of-state and International members connect
4. Helped connect individuals who wanted to study together for the CMA

Connection

1. Personally contacted hundreds of our members with a continued goal to personally connect with every member through:
 - b. Personal, hand-written letter
 - c. Phone call
 - d. Invitation to sit at reserved table with President
2. Connected personally with new and outgoing members

Feedback from our members

- “It was an amazing experience to see everyone being so considerate and being kind enough to take from their busy schedule and share their experience on the exams. I owe it to you guys and I can't thank you enough.”
- “It's clear you and your board are putting significant effort into your duties – the results are tangible and impressive!”
- “I just went to the chapter website and was very pleased to see both the look and, more importantly, the content of the site. After too many years of just rolling along, to see a schedule of events listed in August is great. And to have such a fine list of subjects is really great. You have a great mix of technical and non technical issues.”
- “I know I speak for many financial professionals when I say thank you for your leadership, welcome to the Minneapolis chapter and best wishes for continued success”
- “In February I attended the IFRS presentation and I loved it”
- “Based on the events section of the website, it looks like some very interesting topics will be discussed in the meetings in 2009, so I plan to start attending“
- “You're doing a great job... I've appreciated your professionalism”
- “I've appreciated your great communication; it's been informative and consistent”
- “It seems like the Minneapolis chapter of the IMA is alive, well, and ready to serve its members. It will be interesting to see attendance at the meetings this year. My view always was.....if you provide quality speakers, they will come.”
- “The speaker you have planned sounds fantastic”
- “It appears that you have some good folks ready to speak to the group. Promoting events has not always been an IMA strong point”
- “It's very clear that you and your board are really putting in good effort; the results are apparent. Keep it up!”
- “I hope that the folks at the national offices see and appreciate the importance of what chapter success can bring to the IMA”
- “You have done a tremendous job and I have really enjoyed seeing the improvement you have made. You have created a buzz.”
- “As I told you in person at the IMA meeting, you are doing a great job as President. I've appreciated your emails throughout the year. You do a very professional job of handling the meeting.”
- “I really enjoyed the meetings; they seem to be well-run. The speakers and topics are interesting. Everyone seems to be very friendly and I will definitely come back again. Thanks for all of your time and effort; it shows in the quality of the dinner meetings.”