

# ROM 2013 – Idea Fair Winners

## Best in Finance and Administration- Rocky Mountain AFP

### **What: Small Dollar and expanded Conference Sponsorships**

During the 2012-13 membership year, the Partnering and Summit committees focused on developing 1) a Web Site Sponsorship, 2) a new Diamond Sponsorship (that supports the annual conference) and 3) generate more small dollar sponsorships.

### **Why:**

The RMAFP continues to look for ways in provide value to our Vendor providers AND bring in additional revenue for the association.

**How:** Offered multiple Small Dollar and Special Sponsorships

- 1) Colorado Public Radio (CPR) Campaign: \$250 each spot
- 2) Gift Card Pool: \$50 - \$100
- 3) Luncheon Sponsorship: \$250
- 4) Web Site Sponsor: \$500
  
- 5) Diamond Level Supporter:

### **Plan A**

Summit Platinum Sponsorship	\$3,000
Corporate Membership	\$450
Gift Card support	\$50
Luncheon Sponsorship (1)	\$250
<u>CPR Sponsorship (1)</u>	<u>\$250</u>
	TOTAL \$4,000

### **Plan B**

Summit Platinum Sponsorship	\$3,000
Corporate Membership	\$450
Gift Card support	\$50
<u>Web Site Sponsorship</u>	<u>\$500</u>
	TOTAL \$4,000

**Results:**

\$475 in gift cards

(6) sponsored luncheons – Maximum achieved

(3) CPR ads

(4) New Diamond sponsorships

(8) New Website sponsorships

- \$6,475 in new income to the association (370% increase year over year)
- \$43,500 in vendor sponsorships for the Summit (27% over budget)!

**Best Communication Message – Houston TMA**

The Houston Treasury Management Association uses QR Codes on meeting name tags so that members do not have to carry business cards. Those with a smart phone and a QR reader can click on a name tag and have the contact information stored directly into their smart phone.

**Best Meeting- Dallas AFP**

Each year, the Dallas and Fort Worth regional's hold a joint lunch meeting to encourage networking between the members of the two organizations. This year, the meeting was held on April 16 at the Four Seasons Resort and Club in Irving, home of the HP Byron Nelson Golf Championship. The educational program focused on the economic impact from the tournament on the greater DFW metroplex.

The HP Byron Nelson is presented each year through the hard work of the Salesmanship Club. The club is a philanthropic organization of business leaders that use the proceeds from the tournament to run the Youth and Family Services facility and school. They have worked to improve the lives of at-risk and troubled children and families in the DFW area since 1920. All proceeds from the tournament (roughly \$5 million each year) are returned to the charity and used to fund all the great work that is done by the Youth and Family Services organization.

Our educational program featured an all-star panel moderated by national NBC sportscaster, Scott Murray. Panelists represented the major stakeholders from the week-long event:

Beth Van Duyne, Mayor of Irving, TX

Michelle Kinder, Executive Director of the Youth and Family Centers

Mike McKinley, Tournament Director  
Luis Argote, General Manager, Four Seasons Resort and Club  
Angie Tipton, HP Manager of Global Sponsorships

The program was very educational and served as an eye-opener to the majority of our attendees. Most did not realize how the local charity is supported by this PGA tournament. We also learned about the many opportunities available for groups to volunteer at the Youth and Family Center. Dallas AFP participates in 3-4 community involvement events each year and we have scheduled an event with them for early Fall. It is a win-win for both organizations.

### **Best New Idea for Partnering – Dallas AFP**

The Dallas AFP is always looking for new groups to network and partner with. This June we partnered with the Federal Reserve Bank of Dallas to host a networking and cocktail reception. The Federal Reserve Bank of Dallas recently remodeled their lobby, opening up a new exhibit entitled “The Economy in Action.” The exhibit offers a learning experience about the Federal Reserve, money and the economy.

This was a new event for us – to promote the Dallas AFP and help expand everyone’s network.

We scheduled this event for the late afternoon, providing the regular daytime attendees an additional networking opportunity. We also invited several additional groups:

- ALPFA, Association of Latino Professionals in Finance and Accounting
- NABA, National Association of Black Accountants
- CFA Institute, Chartered Financial Analyst Institute
- Fort Worth AFP

Based on the number of new attendees this appears to have been a very successful networking event. It also served as a valuable opportunity to promote diversity within DAFP and our many member companies.

We see this as the first step in a natural progression of co-networking and branding with non-traditional associations to increase our community presence, relevance, membership and demographics.

## **Membership Growth & Retention – Detroit TMA**

### **Gift Memberships**

For the past 2-3 years DTMA has maintained steady membership of 100-120 members. For 2014 the board decided that a good growth opportunity lies with our current members - asking them to invite a guest to our bi-monthly meeting at no charge to the guest (guest fee is normally \$60).

- Guests receive a gift padfolio and stylus pen with the DTMA logo.
- If the guest decides to join DTMA during the meeting then membership is free for one year. Note: bi-monthly meetings would be charged at the member rate of \$50.

Our goal is to let the guest know that we are honored to have them join us for the meeting and that we are excited about the opportunity to network and share with them on a regular basis. As an expression of our appreciation we offer the first year of membership at no charge.

### **Open Topic – AFP of Western New York**

One challenge that we are facing at AFP of Western New York is the recruitment of new Board Members. It is possible that our members and perspective members are not aware of the benefits of serving on the Board.

We asked our Nominating Chair to develop a brochure that we could distribute to members and post on the Web site.

The brochure includes a write up on AFP of Western New York, the benefits of serving and pictures of the Board engaged in both both local and national AFP activities. We emphasize that board members can provide input on speakers, topics and venues for the upcoming fiscal year.

Additional benefits for serving on the Board:

- The President receives an all inclusive trip to the National AFP conference
- The Treasurer receives an all inclusive trip to the AFP Regional Officers (ROM) meeting
- Board members earn four CTP recertification credits per one-year term on the Board
- Board members receive a free lifetime free membership in AFPWNY ( membership fee only)

This is our first attempt at formally marketing board positions and it is still too early to determine the campaign's success.

**Best in Show Display–**

**Greater Washington AFP**

**Best Idea Fair Submission–**

**Detroit TMA in the Membership Growth & Retention category** \* submission listed above