

The Next Chapter: Broadening, Deepening and Elevating WIFM's Impact



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3-Year Vision of WIFM

Increased Membership: 10,000+ members across regions

Expanded Fundraising Efforts: Raise \$1MM+ in funding for programs, events, & other WIFM priorities

Elevated Brand: Become a 'household name' in finance with enhanced multi-regional engagement and structure

Resource Optimization: Leverage of broader WIFM community to enable board execute on priorities, Digital expansion with the help of AI and other tools

Strong Network Engagement

- Continue to run high quality events and programs across diverse range topics
- Develop series of smaller more customized events for sponsors, ambassadors, and board members as network expands
- Ongoing participation from sponsors

First 90 Days

- Get better handle on current use of resources (employees, ambassadors, tools, etc)
- 1:1 discussions with board members, ambassadors, and staff for feedback & ideas
- Develop and communicate best practices around sponsor engagement

How Do We Measure Success and Progress?

- Regular Member & Sponsor Surveys
- Enhanced metrics around membership profile, set growth & expansion targets and provide board with regular progress updates
- Track sponsor participation in events and programs
- Tracking of cohort participants and post-program completion

What Support is Needed?

- Continuous promotion of WIFM membership/events
- Ambassador leadership & engagement with board
- Usage of enhanced technology
- Support & Implementation of enhanced Sponsor engagement structure
- Continuous participation in events and programs

How Do We Get There? → 8 Key Areas of Focus

- 1 Create Global / Regional "Chapter" Structure**
 - Assign regional leads with key deliverables (membership growth, smaller in person get togethers / events, etc.)
 - Leverage Ambassadors and active members in regions to lead efforts
- 2 Implement Enhanced Sponsor & Member Engagement Strategy**
 - Create more formalized structure with identified deliverables to increase number of members & sponsors
 - Expand reach to areas of finance that WIFM hasn't been as active in
 - Deepen relationships with sponsors and have more ongoing engagement with decisionmakers
 - Continue to run more targeted/intimate events in parallel to larger ones
- 3 Optimize Resources & Create Growth Opportunities**
 - Expanding opportunities for Ambassadors to lead board initiatives and projects
 - Implement & leverage working group structure
 - Develop formal pipeline
 - Enhance organizational transparency
- 4 External Partnerships**
 - Identify/implement partnerships with other organizations to expand our outreach and profile (e.g., ETFs) and create more formalized strategy around this
 - Understand best practices in other networks
- 5 Fundraising**
 - Continue to evolve fundraising strategy
- 6 Board Development**
 - Provide board with opportunities to hear from SMEs on industry developments in relation to DEI
 - Have guest speakers present to board on various topics (compensation, paid board readiness, media speaking, etc)
- 7 Digital Engagement**
 - Expand on virtual programming for those not in major cities
 - Leverage of AI & other tools to create scale
- 8 Media Presence**
 - Increase board member presence on public platforms
 - Leverage media to quote / feature WIFM board members