

OUR PURPOSE

Our purpose is to:

- Educate, inform and encourage our members to be better investors
- Provide opportunities for members to meet and share information with other investors
- Advocate on issues affecting independent investors

OUR VISION

Our vision is to provide the self-directed investor with sound investment knowledge and education, and become Australia's premier trusted independent investor organisation

OUR VALUES

- Trusted providers of information
- Independent and accessible
- Ethical and honest practices
- Not being influenced by product providers
- Open sharing of information.

KEY PERFORMANCE AREAS

AIA has identified six key performance areas (KPA's) as fundamental to the achievement of its objectives. These KPA's gather together actions of a similar kind,

The Key Performance Areas are:

- Investor education
- Investor support and engagement
- Resources
- External relations
- Membership – recruitment and retention
- Governance

For each of these a number of goals and selected strategies are outlined below.

KPA 1: Investor Education

Goals

- A comprehensive program of educational activities to meet the needs of novice and experienced investor members.
- A national program of information sessions, conferences and seminars, online events and publications to keep members up-to-date with matters of interest.

Strategies

Selected Strategies	Responsibility
<ul style="list-style-type: none">• Develop and implement a prioritised educational program underpinned by policies and guidelines• Conduct an annual 3-day national conference	Education Committee, with support of Board Executive Committee with support of the Board
Other Initiatives	
<ul style="list-style-type: none">• Organise an Australia-wide pattern of 1 day seminars and courses• Regular information sessions• Provide a regular program of informative webinars, available to all members	State Chairs & Events and Member Services Coordinator (EMSC) State Chairs Board Member to lead - EMSC

KPA 2: Investor Support and Engagement

Goals

- Opportunities for members to meet and exchange information about their investing and investment-related practices
- An online forum for members to share information and opinions

Strategies

Selected Strategies	Responsibility
<ul style="list-style-type: none">• Conduct local discussion groups• Keep members informed of AIA developments through Member Updates	State Chairs President
Other Initiatives	
<ul style="list-style-type: none">• Encourage members to interact informally through forums, email and social media	State Chairs

KPA 3: Resources

Goals

- A knowledgeable and high productivity Secretariat
- Committed and empowered member volunteers to run and grow the organisation
- A website that serves as a storehouse of information useful to members
- A suite of publications keeping members up-to-date
- Increased sponsorship support from business

Strategies

Selected Strategies	Responsibility
<ul style="list-style-type: none"> • Provide a suite of online and hard-copy publications – IV, AIA Investor Update • Discern what information members value through periodic surveys and networking 	<p>Executive Committee</p> <p>Executive Committee</p>
Other Initiatives	
<ul style="list-style-type: none"> • Increased level of business sponsorship Integrated across the total scope of AIA activities. • Identify members with skills and willingness to volunteer on regional committees, Board committees and the Board • Identify tasks that can be carried out by volunteer members and request their support 	<p>EMSC, Marketing/Membership Committee</p> <p>State chairs, Directors</p> <p>State Chairs, Directors</p>

KPA 4: External Relations

Goals

- A higher profile for the AIA in the news media and among the public in general
- Advocacy with legislators and regulators in the interests of members

Strategies

Selected Strategies	Responsibility
<ul style="list-style-type: none"> • Develop a set of prioritised strategies to build robust external relationships • Establish joint-ventures with relevant business organisations as opportunities arise 	<p>Media- Marketing-Membership Committee, led by Board Member</p> <p>Executive Committee with support of Board</p>
Other Initiatives	
<ul style="list-style-type: none"> • ‘Plant’ investing stories in news media via ‘cultivated’ journalists. • Report on the Sentiment Survey results • Promote AIA media spokespersons. (President and Board Members) • Participate in Expos. • Identify emerging issues of relevance to members and prepare submissions for the appropriate authority 	<p>Directors, Marketing-Membership Committee</p> <p>Executive Committee</p> <p>Executive Committee</p> <p>EMSC</p> <p>Directors, Education Committee</p>

KPA 5: Membership – recruitment and retention.

Goals

- Increase membership 20% each year
- Maintain member retention rate above 90% per year

Strategies

Selected Strategies	Responsibility
<ul style="list-style-type: none"> • Expand member services • Press releases and commentary to news media • Member recruitment activities by regional committees • Involve members more in AIA activities • Follow-up members near and after expiry of membership 	Board Board State Chairs State Chairs, Committees EMSC, Office Manager
Other Initiatives	
<ul style="list-style-type: none"> • Establish more personal welcoming processes for new members and guests • Provide a number of forums for members to meet and communicate with other members – online or face to face • Recognise 5,10-year membership • Offer ‘rewards’ for continuing membership. 	State Chairs Board

KPA 6: Governance

Goals

- A well functioning Board of Directors and Committees serving the needs of the organisation
- Succession plan for all key personnel
- An updated Constitution that serves the goals of the Association and needs of its members
- A comprehensive Policy and Procedures Manual

Strategies

Selected Strategies	Responsibility
<ul style="list-style-type: none"> • Develop and implement an AIA Strategic Plan and Annual Program of work • Formalise responsibilities for AIA staff, Executive, Board, Committees and volunteers • Appoint or elect additional directors to resource the Board committees 	Board Board Nominations Committee with support of the Board and Members
Other Initiatives	
<ul style="list-style-type: none"> • Establish a Governance Committee to assist the Board • Prepare and manage annual business plans and budgets • Complete the Policy and Procedures Manual, distribute and update regularly 	Board Executive Committee Executive Committee