



"Lifting As We Climb"

# NABA, INC.

NATIONAL ASSOCIATION OF BLACK ACCOUNTANTS, INC.

# VISION2020

*Growth | Self-Sufficiency | Impact on Community & Industry*

## NABA's 3-Year Strategic Plan

# Acknowledgements

## **NABA FY2015 Board of Directors**

- Kenneth E. Cooke, Chairman
- Steven L. Harris, Vice-Chair
- Sheila-Taylor Clark, Treasurer
- Veda S. Stanley, Secretary
- Justin A. Butler
- Earl G. Fagan
- Herschel Frierson
- Reve P. Ross
- Dr. Mark Kiel
- Sherry Ann Mohan
- Dimeta Smith
- Ronald E. Taylor
- Daniel E. Worrell
- Shariah Dixon-Turner

## **Strategic Planning Committee**

- Shariah Dixon-Turner, Chair
- Gene Padgett
- Janine Rouson
- Ronald E. Taylor
- Herschel Frierson
- Mike Giles

## **Deloitte**

- Kim Griffin-Hunter
- Kimberly Comer Mulqueen
- Jason Rife
- Nidhie Singh
- William Dehnert
- Asma Quereshi



## ***NABA Staff***

- *Jina Etienne, President & CEO*
- *Lauren Yost, Chief Operating Officer*
- *Kim Wilson, Vice President – Programs & Resources*



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[www.nabainc.org](http://www.nabainc.org)

# A Renewed Mission and Commitment to Diversity & Inclusion

- The mission of NABA, Inc., is to address the professional needs of its members and to build leaders that shape the future of the accounting and finance profession with an unfaltering commitment to inspire the same in their successors. The Association shall unite through membership accountants, finance and business related professionals and students who have similar interests and ideals, are committed to professional and academic excellence, possess a sense of professional and civic responsibility, and are concerned with enhancing opportunities for minorities in the accounting, finance and business related professions.
- The goals of the Association include, but are not limited to, the following:
  - To promote and develop the professional skills of our members.
  - To encourage and assist minority students entering the accounting profession.
  - To provide opportunities for members to fulfill their civic responsibilities.
  - To promote public confidence in our members and the services they provide.
  - To encourage cordial relations among members and cooperative relationships with other professionals.
  - To represent the interests of current and prospective minority accounting professionals.
  - To ensure long-term financial stability and provide adequate resources to implement chapter, regional, and national programs.



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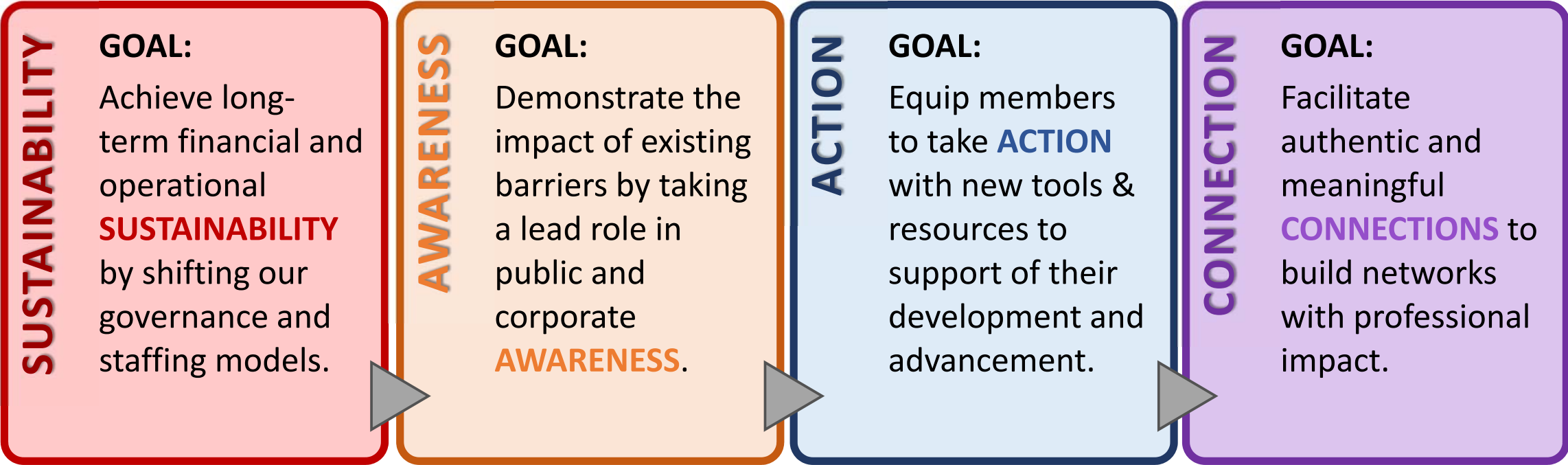
# New Vision | Five Priorities

## *New Vision Statement*<sup>^</sup>

*“Ensuring our seat at the table”  
Unlimited opportunities and growth for blacks in  
accounting and related business professions.*



# Four Strategic Goals



stakeholders

SUSTAINABILITY	AWARENESS	ACTION	CONNECTION
Achieve financial and operational <b>SUSTAINABILITY</b> .	Demonstrate the impact of barriers to improve <b>AWARENESS</b> .	Equip members with tools and resources to take <b>ACTION</b> .	Facilitate authentic and meaningful <b>CONNECTIONS</b> .
<p><b>PIPELINE</b></p> <p>Create new and strengthen existing relationships with colleges &amp; universities.</p> <p><b>PROFESSIONALS</b></p> <p>Increase focus on member issues, needs and industry concerns.</p> <p><b>PARTNERS</b></p> <p>Build out infrastructure to support new workplace equity programs.</p>	<p><b>PIPELINE</b></p> <p>Develop communication to improve awareness, interest and support.</p> <p><b>PROFESSIONALS</b></p> <p>Collect member feedback to inform our messages of impact and need.</p> <p><b>PARTNERS</b></p> <p>Build a coalition to advance the mission and reach new audiences for mutual benefit.</p>	<p><b>PIPELINE</b></p> <p>Create new programs aimed to encourage and promote entry into the profession.</p> <p><b>PROFESSIONALS</b></p> <p>Equip members with tools to prepare them for leadership and advancement.</p> <p><b>PARTNERS</b></p> <p>Create new tools and resources to help improve employment practices for a diverse workforce.</p>	<p><b>PIPELINE</b></p> <p>Develop new programs to better prepare students for an accounting career.</p> <p><b>PROFESSIONALS</b></p> <p>Develop formal and informal programs to prepare students for an accounting career.</p> <p><b>PARTNERS</b></p> <p>Create opportunities to engage with members in ways to meet target strategies.</p>

# Ten Initiatives | Three Years

*(What actions do we need to take to achieve the vision & mission?)*

## Organizational Effectiveness

Develop high-performance, director-led staff teams with expertise in association management.



1

Align all organizational standards and documents with new BOD vision.



2

Maximize relationships with colleges & partners by shifting focus of regional work.



3

## Financial Sustainability

Develop a national RSC model to deliver uniform experience in targeted locations.



4

Launch web based events, programs and learning opportunities.



5

## Advocacy & Thought Leadership

Establish a platform for education equality as a core solution to diversity issues in the profession.



6

Develop standards for workplace equity as basis for solving the long-term retention challenges.



7

## Marketing & Branding

Deploy an inclusive strategy to define and manage overall NABA brand.



8

## Program & Leadership Development

Develop a leadership competency model as foundation for NABA branded leadership development content.



9

Establish measures of technical excellence for key accounting and finance career paths.



10

## Short Term

(FY 2017)

- Organizational Effectiveness
- Financial Sustainability
- Advocacy & Thought Leadership
- Marketing / Branding
- Program and Leadership Development

### FY2017 Priorities:

- Align all organizational documents with strategic plan
- Streamline and better integrate national, regional and chapter operations
- Diversify revenue stream
- Deliver consistent messaging across all communication channels and platforms
- Pilot new programs developed nationally but delivered locally





Short Term -----> Mid-Range  
(FY 2017) (FY 2018)



FY2018 Priorities:

- Board of Directors seen as an effective and strategic governing body
- Finalize principles of education equality and workplace equity as platform for advocacy
- Develop new branding and communications strategy
- Develop competency model and technical excellence framework



Short Term -----> Mid-Range -----> Long Term  
(FY 2017) (FY 2018) (FY 2019)

- Organizational Effectiveness
- Financial Sustainability
- Advocacy & Thought Leadership
- Marketing / Branding
- Program and Leadership Development

**FY2019 Priorities:**

- Minimize need for/use of line of credit and establish reserve policy
- Streamline financial management to improve cost and financial reporting across organization
- New member resources drive member value
- Expand programming to include training sought by outside groups and non-members

