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Response Summary

Total Started Survey: 59

Total Completed Survey: 59 (100%)

Page: Welcome to CFA Society of San Antonio 2009-2010 Survey

1. How long have you been a member of CFA Society of San Antonio?

[Create Chart](#)

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	Response Percent	Response Count
Less than 1 year <input type="checkbox"/>	10.2%	6
1 to 5 years <input type="checkbox"/>	22.0%	13
5 to 10 years <input type="checkbox"/>	20.3%	12
More than 10 years <input type="checkbox"/>	47.5%	28

answered question 59

skipped question 0

2. In which of the following industry categories do you work?

[Create Chart](#)

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	Response Percent	Response Count
Equity <input type="checkbox"/>	27.1%	16
Fixed Income <input type="checkbox"/>	37.3%	22

answered question 59

skipped question 0

2. In which of the following industry categories do you work?

[Create Chart](#)

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Wealth Management	<input type="checkbox"/>	30.5%	18
Asset Allocation – Institutional/Pension Mgt.	<input type="checkbox"/>	13.6%	8
Corporate Finance	<input type="checkbox"/>	10.2%	6
Private Equity	<input type="checkbox"/>	3.4%	2
Real Estate		0.0%	0
Other	<input type="checkbox"/>	18.6%	11
answered question			59
skipped question			0

3. In which of the following approximate locations do you work?

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		Response Percent	Response Count
Downtown Central Business District	<input type="checkbox"/>	15.5%	9
Central San Antonio (Inside 410)	<input type="checkbox"/>	13.8%	8
North East (281 btwn. 410 & 1604)	<input type="checkbox"/>	15.5%	9
North West (I-10 btwn. 410 & 1604)	<input checked="" type="checkbox"/>	46.6%	27
Far North (1604 btwn. I-10 & 281)	<input type="checkbox"/>	3.4%	2
East		0.0%	0
West		0.0%	0
South		0.0%	0
Outside of San Antonio	<input type="checkbox"/>	6.9%	4
answered question			58
skipped question			1

4. In which of the following approximate locations do you live?

[Create Chart](#)

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		Response Percent	Response Count
Downtown Central Business District		0.0%	0
Central San Antonio (Inside 410)	<input type="checkbox"/>	18.6%	11
North East (281 btwn. 410 & 1604)	<input type="checkbox"/>	23.7%	14
North West (I-10 btwn. 410 & 1604)	<input type="checkbox"/>	20.3%	12
Far North (1604 btwn. I-10 & 281)	<input type="checkbox"/>	13.6%	8
East		0.0%	0
West	<input type="checkbox"/>	3.4%	2
South		0.0%	0
Outside of San Antonio	<input type="checkbox"/>	20.3%	12
answered question			59
skipped question			0

5. Satisfaction (Please assess on a 1 to 5 scale, where '1' means not at all valuable and '5' means extremely valuable.) How would you assess the overall value of the CFA Society of San Antonio membership?

[Create Chart](#)

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		Response Percent	Response Count
1	<input type="checkbox"/>	1.7%	1
2	<input type="checkbox"/>	1.7%	1
3	<input type="checkbox"/>	25.4%	15
4	<input type="checkbox"/>	54.2%	32
5	<input type="checkbox"/>	16.9%	10
answered question			59
skipped question			0

6. Do you feel that your society is on the right track to meet your needs for the next 2 to 3 years? [Create Chart](#) [Download](#)

	Response Percent	Response Count
Yes <input type="checkbox"/>	83.1%	49
Not Sure <input type="checkbox"/>	16.9%	10
No <input type="checkbox"/>	0.0%	0
answered question		59
skipped question		0

7. How important is it that your society engages in each of the following types of functions: (Please assess on a 1 to 5 scale, where '1' means not at all and '5' means extremely valuable.) [Create Chart](#)

	1	2	3	4	5	Rating Average
Promote the CFA charter locally	0.0% (0)	11.9% (7)	18.6% (11)	32.2% (19)	37.3% (22)	3.9
Hold networking events	3.4% (2)	5.2% (3)	36.2% (21)	36.2% (21)	19.0% (11)	3.6
Hold educational events	0.0% (0)	0.0% (0)	6.8% (4)	33.9% (20)	59.3% (35)	4.5
Provide tutoring and/or prep courses for CFA candidates	15.8% (9)	14.0% (8)	43.9% (25)	14.0% (8)	12.3% (7)	2.9
Hold career development events	0.0% (0)	13.8% (8)	44.8% (26)	31.0% (18)	10.3% (6)	3.3
Provide career development resources	0.0% (0)	7.0% (4)	35.1% (20)	38.6% (22)	19.3% (11)	3.7
Hold events on "soft skills" development (e.g., leadership, communication)	15.5% (9)	24.1% (14)	29.3% (17)	22.4% (13)	8.6% (5)	2.8
answered question						
skipped question						

8. Are there other types of functions you would like your society to engage in? [Download](#)

Response Count

 [Show replies](#) 10

answered question 10

skipped question 49

9. Programs & Venues For each society program or activity listed below, please indicate how valuable each of these types of programs or activities w to you. (Please assess on a 1 to 5 scale, where '1' means not at all valuable and '5' means extremely valuable.) [Create Chart](#) [Downl](#)

	1	2	3	4	5	Respon Cour
2007 Holiday Party/Wine Tasting at '209' (Dec. 2007)	29.4% (10)	20.6% (7)	20.6% (7)	20.6% (7)	8.8% (3)	
2008 Holiday Party at The Museo Alameda (Dec. 2008)	28.6% (10)	14.3% (5)	37.1% (13)	11.4% (4)	8.6% (3)	
The Economy of Mexico (Professor Jorge Gonzalez; Jan. 2008)	2.4% (1)	4.8% (2)	23.8% (10)	40.5% (17)	28.6% (12)	
The CFA Institute's Private Wealth Initiative: Asset Allocation (Stephan Horan; Mar. 2009)	0.0% (0)	12.8% (5)	30.8% (12)	41.0% (16)	15.4% (6)	
Corporate Performance, Valuation, & Market Performance (Rafael Resendes; Apr. 2009)	0.0% (0)	8.1% (3)	35.1% (13)	32.4% (12)	24.3% (9)	
Equity Valuation (Professor Robert Parrino; Apr. 2009)	0.0% (0)	5.3% (2)	42.1% (16)	31.6% (12)	21.1% (8)	
ETF's and Portfolio Construction (State Street Global; May 2009)	5.0% (2)	10.0% (4)	27.5% (11)	32.5% (13)	25.0% (10)	
CFA Society of San Antonio Annual Meeting & Happy Hour (Jun. 2009)	9.4% (3)	25.0% (8)	28.1% (9)	28.1% (9)	9.4% (3)	
Regulating Green House Gases (Tesoro; Sep. 2009)	5.1% (2)	10.3% (4)	30.8% (12)	30.8% (12)	23.1% (9)	

answered question

skipped question

9. Programs & Venues For each society program or activity [Create Chart](#) [Download](#)
 listed below, please indicate how valuable each of these types of programs or activities w
 to you. (Please assess on a 1 to 5 scale, where '1' means not at all valuable and '5' means
 extremely valuable.)

The US Economy in 2010 (Maury Harris) & New Charter Recognitions (Oct. 2009)	2.2% (1)	4.3% (2)	13.0% (6)	41.3% (19)	39.1% (18)
Pilgrimage to Warren Buffett's Omaha (Jeff Matthews; Oct. 2009)	7.5% (3)	12.5% (5)	30.0% (12)	40.0% (16)	10.0% (4)
The Role of a Whistle-Blower (Noreen Harrington; Nov. 2009)	2.3% (1)	9.3% (4)	20.9% (9)	25.6% (11)	41.9% (18)
An Eclectic Approach to the Current Market (Dan Fuss; Dec. 2009)	7.0% (3)	0.0% (0)	32.6% (14)	32.6% (14)	27.9% (12)

answered question

skipped question

10. Locations (Please Rank the Venue) (Please assess on a [Create Chart](#) [Download](#)
 1 to 5 scale, where '1' means not at all valuable and '5' means extremely valuable.)

	1	2	3	4	5	Respon Cour
'209	17.1% (6)	8.6% (3)	48.6% (17)	11.4% (4)	14.3% (5)	
The Museo Alameda	18.4% (7)	26.3% (10)	36.8% (14)	13.2% (5)	5.3% (2)	
The Palm	4.0% (2)	12.0% (6)	16.0% (8)	46.0% (23)	22.0% (11)	
The Plaza Club	3.9% (2)	23.5% (12)	27.5% (14)	21.6% (11)	23.5% (12)	
Maggiano's	6.0% (3)	8.0% (4)	20.0% (10)	22.0% (11)	44.0% (22)	
Paesano's	2.0% (1)	8.2% (4)	16.3% (8)	44.9% (22)	28.6% (14)	
Stone Werks at The Quarry	9.5% (4)	9.5% (4)	35.7% (15)	26.2% (11)	19.0% (8)	

answered question

skipped question

10. Locations (Please Rank the Venue) (Please assess on a 1 to 5 scale, where '1' means not at all valuable and '5' means extremely valuable.) [Create Chart](#) [Download](#)

Oak Hills Country Club	5.9%	21.6%	15.7%	31.4%	25.5%
	(3)	(11)	(8)	(16)	(13)

answered question

skipped question

11. How many society events did you attend in the past 12 months (since January 2008)? [Create Chart](#) [Download](#)

	Response Percent	Response Count
None <input type="checkbox"/>	8.5%	5
1-2 <input type="checkbox"/>	10.2%	6
3-5 <input checked="" type="checkbox"/>	45.8%	27
6-8 <input type="checkbox"/>	20.3%	12
More than 8 <input type="checkbox"/>	18.6%	11

answered question **59**

skipped question **0**

12. If you did not attend any events, what is the main reason that you did not attend? [Create Chart](#) [Download](#)

	Response Percent	Response Count
Lack of time <input checked="" type="checkbox"/>	52.9%	18
Lack of interest <input type="checkbox"/>	5.9%	2
Inconvenient locations <input type="checkbox"/>	8.8%	3
Inconvenient times or days <input type="checkbox"/>	26.5%	9
Was not informed about the events <input type="checkbox"/>	2.9%	1

answered question **34**

skipped question **25**

12. If you did not attend any events, what is the main reason that you did not attend?

[Create Chart](#)

[Download](#)

Was not interested in the event being offered	<input type="checkbox"/>	20.6%	7
Other (please specify)	<input type="checkbox"/>	14.7%	5
Show replies Other (please specify)			5
answered question			34
skipped question			25

13. Please indicate your level of interest in attending a society program focused on each of the topics listed below. Level of Interest 1 = Not at all = Extremely interested. TOPICS:

[Create Chart](#)

[Download](#)

	1	2	3	4	5	Respon Cour
Ethical and Professional Standards	6.9% (4)	17.2% (10)	27.6% (16)	32.8% (19)	15.5% (9)	
Quantitative Methods	3.4% (2)	19.0% (11)	25.9% (15)	39.7% (23)	12.1% (7)	
Economics	0.0% (0)	3.4% (2)	10.3% (6)	39.7% (23)	46.6% (27)	
Financial Statement Analysis	1.8% (1)	10.5% (6)	26.3% (15)	35.1% (20)	26.3% (15)	
Corporate Finance	0.0% (0)	17.9% (10)	23.2% (13)	39.3% (22)	19.6% (11)	
Equity Investments	0.0% (0)	5.3% (3)	15.8% (9)	35.1% (20)	43.9% (25)	
Fixed Income Investments	1.7% (1)	3.4% (2)	18.6% (11)	30.5% (18)	45.8% (27)	
Derivatives	1.7% (1)	8.6% (5)	27.6% (16)	37.9% (22)	24.1% (14)	
Portfolio Management	0.0% (0)	1.7% (1)	8.5% (5)	40.7% (24)	49.2% (29)	
answered question						
skipped question						

13. Please indicate your level of interest in attending a society program focused on each of the topics listed below. Level of Interest 1 = Not at all = Extremely interested. TOPICS: [Create Chart](#) [Download](#)

Topic	1	2	3	4	5
Risk Management	0.0% (0)	5.1% (3)	11.9% (7)	45.8% (27)	37.3% (22)
Private Wealth Management	0.0% (0)	10.2% (6)	28.8% (17)	30.5% (18)	30.5% (18)
Hedge Funds	1.7% (1)	17.2% (10)	31.0% (18)	32.8% (19)	17.2% (10)
Private Equity	0.0% (0)	18.6% (11)	33.9% (20)	27.1% (16)	20.3% (12)
Other Alternative Investments (Commodities, Real Estate, etc.)	0.0% (0)	8.8% (5)	15.8% (9)	36.8% (21)	38.6% (22)
Soft Skills (leadership, communication, etc.)	20.7% (12)	22.4% (13)	20.7% (12)	25.9% (15)	10.3% (6)
Career Development	17.2% (10)	22.4% (13)	29.3% (17)	17.2% (10)	13.8% (8)

answered question

skipped question

14. Are there other topics you would like your society to offer programs on?

[Download](#)

Response
Count

 Show replies 9

answered question 9

skipped question 50

15. Please indicate your preferred days and times for educational events.

[Create Chart](#)

Breakfast Morning Lunch Afternoon Evening

answered question

skipped question

15. Please indicate your preferred days and times for educational events.

[Create Chart](#)

Day	8.8% (3)	0.0% (0)	88.2% (30)	2.9% (1)	20.6% (7)
Monday	8.8% (3)	0.0% (0)	88.2% (30)	2.9% (1)	20.6% (7)
Tuesday	15.4% (8)	1.9% (1)	86.5% (45)	7.7% (4)	13.5% (7)
Wednesday	10.9% (5)	2.2% (1)	89.1% (41)	6.5% (3)	17.4% (8)
Thursday	11.8% (6)	0.0% (0)	94.1% (48)	7.8% (4)	19.6% (10)
Friday	21.9% (7)	3.1% (1)	78.1% (25)	3.1% (1)	9.4%
Saturday	16.7% (1)	0.0% (0)	33.3% (2)	33.3% (2)	33.3% (2)
Sunday	0.0% (0)	25.0% (1)	25.0% (1)	50.0% (2)	0.0%

answered question

skipped question

16. Which of the following areas of San Antonio would you be willing to go to, to attend society programs or activities of interest to you?

[Create Chart](#)

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	Response Percent	Response Count
Downtown Central Business District <input type="checkbox"/>	81.0%	47
Central San Antonio (Inside 410) <input type="checkbox"/>	74.1%	43
North East (281 btwn. 410 & 1604) <input type="checkbox"/>	51.7%	30
North West (I-10 btwn. 410 & 1604) <input type="checkbox"/>	65.5%	38
Far North (1604 btwn. I-10 & 281) <input type="checkbox"/>	51.7%	30
East <input type="checkbox"/>	13.8%	8


answered question **58**

skipped question **1**

16. Which of the following areas of San Antonio would you be willing to go to, to attend society programs or activities of interest to you? [Create Chart](#) [Download](#)

West	<input type="checkbox"/>	8.6%	5
South	<input type="checkbox"/>	5.2%	3
answered question			58
skipped question			1

17. Please list any specific locations/venues you would like CFASSA to explore for holding lunches or other events? [Download](#)

	Response Count
 Show replies	3
answered question	3
skipped question	56

18. Please indicate how important it is to you that your society offers the following online resources. (Please indicate the level of importance on a 1 to 5 basis, where '1' means not at all important and '5' means extremely important.) [Create Chart](#) [Download](#)

	1	2	3	4	5	Response Count
Chat rooms, blogs, bulletin boards	32.1% (18)	26.8% (15)	26.8% (15)	5.4% (3)	8.9% (5)	
Job board/job postings	8.8% (5)	10.5% (6)	17.5% (10)	28.1% (16)	35.1% (20)	
Member directory	0.0% (0)	7.1% (4)	16.1% (9)	32.1% (18)	44.6% (25)	
Virtual meeting attendance	14.8% (8)	13.0% (7)	37.0% (20)	22.2% (12)	13.0% (7)	
Webcasts	12.7% (7)	12.7% (7)	25.5% (14)	34.5% (19)	14.5% (8)	
answered question						
skipped question						

18. Please indicate how important it is to you that your society offers the following online resources. (Please indicate the level of importance on a 1 to 5 basis, where '1' means not at all important and '5' means extremely important.) [Create Chart](#) [Download](#)

	1	2	3	4	5
Podcasts	18.5% (10)	22.2% (12)	29.6% (16)	25.9% (14)	3.7% (2)
Online calendar of events	0.0% (0)	5.5% (3)	12.7% (7)	36.4% (20)	45.5% (25)

answered question

skipped question

19. What other online resources would you like your society to provide?

	Response Count
	0
<i>answered question</i>	0
<i>skipped question</i>	59

20. III. Local Promotion In regard to promoting the CFA charter, we'd like to know who you think should be the primary targets of this effort. Please rank the following groups in terms of how important you think it is that local promotion efforts be focused on them, with '1' indicating the least important target group for local promotion efforts and '5' indicating the most important target group for local promotion efforts. [Create Chart](#) [Download](#)

	1	2	3	4	5	Response Count
Employers	0.0% (0)	1.9% (1)	9.4% (5)	32.1% (17)	56.6% (30)	
University professors	1.9% (1)	11.5% (6)	38.5% (20)	23.1% (12)	25.0% (13)	
University students	3.8% (2)	11.5% (6)	30.8% (16)	38.5% (20)	15.4% (8)	
Regulators	5.8% (3)	19.2% (10)	36.5% (19)	17.3% (9)	21.2% (11)	

answered question

skipped question


20. III. Local Promotion In regard to promoting the CFA charter, we'd like to know who you think should be the primary targets of this effort. Please rank the following groups in terms of how important you think it is that local promotion efforts be focused on them, with '1' indicating the least important target group for local promotion efforts and '5' indicating the most important target group for local promotion efforts. [Create Chart](#) [Download](#)

	1	2	3	4	5
Potential business clients	1.9% (1)	15.4% (8)	21.2% (11)	26.9% (14)	34.6% (18)
High-net-worth investors	0.0% (0)	3.8% (2)	25.0% (13)	25.0% (13)	46.2% (24)
Investment professionals who are not CFA charterholders	9.6% (5)	7.7% (4)	17.3% (9)	32.7% (17)	32.7% (17)
The general investing public	0.0% (0)	7.5% (4)	13.2% (7)	43.4% (23)	35.8% (19)

answered question

skipped question

21. If there are other target groups that you consider more important for local promotion efforts than those listed above, please identify the target group(s). [Download](#)

	Response Count
 Show replies	1
<i>answered question</i>	1
<i>skipped question</i>	58

22. IV. Communication Please indicate the extent to which you agree or disagree with the following statements about your society: [Create Chart](#)

	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
My society keeps me well informed of upcoming programs and activities.	0.0% (0)	3.4% (2)	1.7% (1)	55.2% (32)	39.7% (23)

answered question

skipped question

22. IV. Communication Please indicate the extent to which you agree or disagree with the following statements about your society:

[Create Chart](#)

My society is effective in its overall communications with its members.	0.0% (0)	3.4% (2)	5.2% (3)	55.2% (32)	36.2% (21)
My society provides sufficient networking opportunities for its members.	0.0% (0)	8.6% (5)	27.6% (16)	44.8% (26)	19.0% (11)
My society is effective in seeking input and feedback from its members about its programs and services.	1.7% (1)	1.7% (1)	20.7% (12)	53.4% (31)	24.1% (14)

answered question

skipped question

23. Please rank the following methods of communication in order of preference, with '1' indicating how you least prefer to receive communications from your society and '5' indicating the most preferred way to receive communications.

[Create Chart](#)

[Download](#)

	1	2	3	4	5	Response Count
E-mail to your personal e-mail address	10.5% (6)	14.0% (8)	19.3% (11)	17.5% (10)	38.6% (22)	
E-mail to your business e-mail address	1.8% (1)	1.8% (1)	7.0% (4)	15.8% (9)	73.7% (42)	
Postal mail	41.1% (23)	16.1% (9)	37.5% (21)	5.4% (3)	0.0% (0)	
Telephone	57.1% (32)	23.2% (13)	17.9% (10)	3.6% (2)	0.0% (0)	
Postings on society website	14.0% (8)	14.0% (8)	43.9% (25)	14.0% (8)	14.0% (8)	

answered question

skipped question