



DEI Initiative Committee Volunteer Responsibilities & Guidelines

All NAPFA members are encouraged and invited to serve on the DEI committee. Members of the committee can expect to attend the bi-monthly committee calls, as well as serve on a sub-committee or project team of their choice. Members of the committee should be passionate about DEI and prepared to participate in a highly interactive group.

Mission

Create and innovate a culture of diversity, equity and inclusion within the financial planning profession.

Vision

Our mission is to be a beacon for DE&I within the financial planning profession by building and strengthening relationships between industry professionals and the diverse populations they serve.

Estimated Time Commitments

The Diversity, Equity & Inclusion Committee members are expected to reasonably commit to the following meetings, webinars and/or training sessions. The Committee expects its volunteers to commit to attending bi-monthly, hour-long committee calls. 2-3 hours per month on sub-committee or project-specific work, and a willingness to consider DEI-conference specific work if a committee member attends a NAPFA conference. If a member is unable to attend committee or subcommittee calls, they should provide advance notice as reasonably as possible. If multiple calls are missed, the member should consider their availability to continue involvement.

Committee Calls (Every other month) | 1 hour each

February | April | June | August | October | December

Committee members should come to these meetings with updates in their respective areas and be willing to participate in discussions with the full committee.

Subcommittee Involvement

- Average monthly time commitment is 2 – 3 hours, depending on the initiative.
- Committee members should actively participate in one or more subcommittee initiatives and projects. Some projects or initiatives will be short term, while others will be ongoing. Interest and involvement by any one member may change over time.

Projects and Initiatives Overview

- **DEI Culture at NAPFA** - An ongoing goal of the DEI committee is to create a welcoming environment for NAPFA members from diverse backgrounds, focusing particularly on underrepresented populations. Committee members should strategize ideas and implement through current and future projects. They will also analyze data to understand impact of projects.
- **Social Media** - This sub-committee works on creating strategy to engage members on social media platforms. All members of the committee are asked to contribute content on an ongoing basis.
- **Scholarships** - NAPFA awards conference scholarships for each national conference and live review CFP scholarships on an annual basis. Scholarship sub-committee members are responsible for recommending recipients of the scholarships. All committee members are responsible for promoting the scholarship to their networks.
- **DEI Toolkit Promotion** - The DEI toolkit was launched as a resource to NAPFA members in December 2020. The sub-committee is responsible for coming up with ways to get NAPFA members to engage with the toolkit resources and to promote the toolkit across the association and profession.
- **Webinars** - The DEI committee has two dedicated webinars per fiscal year allocated to DEI-specific content. The committee is responsible for idea generation around topics and speakers and can work in conjunction with the webinar committee.
- **Conference Sessions** - The DEI committee can sponsor 1-2 conference sessions per conference and is responsible for idea generation around topics and speakers and can work in conjunction with the conference committee. The conference committee is responsible for ensuring that diverse speakers appear in keynote presentations and across technical sessions.
- **Conversation Circles** - The DEI committee is allocated 3-4 conversation circles per fiscal year. Conversation circles are small (10-25) groups having interactive discussions over Zoom. The DEI committee is responsible for generating ideas and speakers for these sessions, and for promoting the sessions to their networks. A member of the DEI committee can also facilitate one of these sessions
- **DEI Certificate Program** - The DEI certificate program is designed to be a deeper dive into the four modules outlined in the DEI toolkit and is meant to assist NAPFA members be successful in their DEI journey. DEI committee members are responsible for idea generation around topics and speakers for each module, promoting the program to their networks, and helping to facilitate the onsite/virtual workshop.

- **Volunteer Recruitment** - Increasing interest and engagement from the NAPFA members into the DEI Committee. Increasing diversity among volunteers. DEI committee members are responsible for strategy and recruitment ideas and promoting related advertisements.
 - **Collaboration with other NAPFA initiatives** - The DEI committee is partnering with regional leaders and with other initiatives to assisted them in incorporating DEI into their practices. DEI committee members are responsible for developing strategy and meeting with other NAPFA groups to support them and execute ideas related to DEI incorporation.
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If you have any questions, please contact Nikki Palluzzi, CAE, at palluzzin@napfa.org.