

UW | LATINOS IN FINANCE

Board Member

Roles &

Responsibilities



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All roles require at least a two year commitment!



President

Responsibilities

- Commitment to serve for two-year term
- Create strategy overview for two year term
- Present your strategy overview to the Executive Board for their input and approval
- Yearly, coordinate the Strategy Planning for Retreat
- Overlook processes, make sure we're sticking to the year's agenda, continuously check in with team members to see where support is needed
 - Bi-annual one-on-ones with each team member
- Coordinate with Secretary to ensure Monthly Meetings are set up

***Highest ethic expectation:** *Your utmost discretion and professionalism is required in this role.*



National Secretary

Responsibilities

- Keep us organized as a team
- Coordinate with Operations Chair as needed to ensure we're uploading and organizing files into Intranet
- We need to collect updates from our committee leads prior to the monthly meeting, take minutes (notes) & to ensure our record retention is up to par.

Working in unison with President and Treasurer:

With President:

- Coordinate with President, Bootcamp Chair, & other committee leads to set monthly agendas, obtain President approval to make sure we're in line with yearly strategy before sending to members
- Send all team members the monthly calendar invite and agendas for our monthly team meeting, at least 2-3 days before the meeting and day of reminder via Slack
- Record notes during our monthly team meetings on google docs & upload them to our Google Drive folder, plus save as PDF for non-profit official record keeping

With Treasurer:

- Disclaimer: National Secretary will have to show thorough organizational skills, dedication to the organization, and trustworthiness. On this basis and on this basis only:
 - National Secretary to handle all the tax filings for the organization

**This is a top 3 role in the organization: President, Treasurer, and National Secretary. We need someone who is committed for at least 2-3 years, and who will commit to training someone to take on the job if they need to step down.*



Treasurer

Responsibilities

- Point of Contact for our team for Budget Approval
- Know our Finances like the back of your hand
- Set a yearly budget, working closely with President, based on our sponsorship donations and long-term/short-term goals as an organization
- Work side by side with the Sponsorship Committee, being the first to know when a new sponsorship closes and how much funds are coming in
- Communicate our yearly org finance overview & budget to the team during Retreat
- Approve expenses for team members before they execute plans
- Have a reimbursement form template ready to send to team members for them to easily fill out
- Keep close track of our finances and be prudent with our organizational spending
- Familiarize yourself with non-profit rules to ensure we're staying within limits

***Highest ethic expectation:** *In this role, you are to have the utmost level of integrity, next to President.*



Bootcamp

Bootcamp Committee Responsibilities

- Grow the Program Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting
- Lead and coordinate the Bootcamp, our largest event of the year
- Update the ongoing, standard LIF Bootcamp Planning Process as necessary
- Coordinate with the various committees as needed, and keep team/committee accountable and on track in, accordance with the LIF Bootcamp Planning Process
- Communicate to National Secretary which tasks need to be addressed during our monthly team meetings to keep us on track as a team
- Serve as point of contact for guest speakers to allow for seamless communication, using standardized email templates

Phases:

1. The Set Up

-February & March

2. Speaker/Partner Orgs Outreach

-April, May, & June

3. Marketing Campaign

-July

4. Coordination with Speakers

-August

5. Team Coordination

-September

6. Follow-Up

-September - October

7. Retreat Recap Preparation

-September - November

**Bootcamp typically held during Hispanic Heritage Month in September.*



Marketing & Comms

Marketing Committee Responsibilities

1. Social Media Marketing

(Might require two individuals tag teaming)

- Set consistent automatic posting for social media platforms, tagging appropriate individuals & including hashtags
- Instagram & Facebook stories - ideally once a day - quotes,
- Instagram & Facebook timeline posts- ideally once a week - upcoming initiatives & LIF features on both platforms @latinosinfinance @latinasinfinance
- LinkedIn - ideally once every two weeks
- Coordinate with team for content, coordinate one-on-one with Poster Creator for posters
- Respond to DM's in cordial, professional manner, signing off with your name & position
- Engage with followers by liking posts in your timeline, leaving comments, giving shoutouts, reposting material from our loyal followers that repost ours

2. Poster Creator

- Use Canva to create posters for upcoming events, in line with Latinos in Finance branding
- Coordinate with team for content, giving them a standard deadline by when materials need to be sent to you (eg. 1 month before event)
- Let the team know the standard information needed (eg. Date/time of event, Title of Event, Guest Speaker Names, Brief Description, & Registration Links)
- Create Eventbrite link for event
- Create separate event registration links to track engagement on social media platforms, and pass along to social media team

3. Video Editor/Photography

(Intersects with Programs Committee)

- Obtain event recordings from the Programs
- Edit into short clips to promote on social media
- Coordinate with Operations Chair to post onto website & Social Media Marketing to promote on Instagram, Facebook, & LinkedIn
- Photographer during live events



Marketing & Comms

Marketing Committee Responsibilities Cont.

4. Communications

- Manage the Monthly Newsletter - set a standard date for the newsletter to go out & coordinate with the team for content, giving them a standard deadline by when materials need to be sent to you (eg. Team Content Deadline 10th of every month; Newsletter published 15th of every month)
- When needed, help team with setting up standard email templates
- Manage Squarespace website to ensure always up to date - tutorial will be provided

5. Community Engagement

(Intersects with Membership)

- Manage interactive member groups on social media (LinkedIn closed group, Facebook group, Slack member channel)
- Create yearly plans for engagement initiatives (eg. posting Marketing materials for upcoming events, posting job opportunities, potentially creating surveys, celebratory posts congratulating individuals on new positions, etc.)
- Consistently posting, at least once a month, to keep engagement high and invite members to participate and interact with one another
- Make a list of 5-10 partner organizations, join their groups, and make a plan to occasionally post about LIF upcoming events & job opportunities
- Coordinating with President for interactive, fun team bonding activities within the LIF team

****One of our most involved and important committees!***



Membership

Membership Committee Responsibilities

1. Point of Contact

You are the point of contact for all new and existing members

2. Membership Demographics

Coordinate with the Data Analytics Chair to create yearly extensive membership survey to gather member demographics

Present member demographics, along with Data Analytics Chair, during the Team Retreat

3. New LIF Member Onboarding

Potentially set up automatic, standard email to send to individuals that sign up as a member with the "member package" (links to social media, calendar, job postings)

Encourage new members to sign up for Monthly Newsletter, send them link in member package

Let new members know of upcoming events

Bonding activities (non-professional settings to break ice even more)

4. New LIF Volunteers Onboarding

Coordinate a call with potential volunteers or send a standard presentation, communicating gaps within the organization, understanding how they would like to be involved

Coordinate with Committee leads & team as a whole to understand which gaps volunteers can fill

5. Community Engagement (Intersects with Marketing)

Manage social media interactive member groups (LinkedIn, Facebook, Slack)

Create yearly plans for engagement initiatives (eg. posting Marketing materials for upcoming events, posting job opportunities, potentially creating surveys, celebratory posts congratulating individuals on new positions, etc.)

Consistently posting, at least once a month, to keep engagement high and invite members to participate and interact with one another



Data Analytics

Data Analytics Committee Responsibilities

- Grow the Data Analytics Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting
- Support data analysis throughout our organization

Yearly Sponsor Reports

- Responsible for creating a report with deep analysis of our org (membership demographics, programs and events engagement during Mentorship Program, Bootcamp, Networking events, etc.) to present to sponsors at the end of the year
- Gather, organize and create a Member Resume book to provide to our sponsors

Mentorship

- Meet with the Director of Mentorship Program on an annual basis to collect data
 - During Mentorship Application collect demographic information on the mentors and mentees
 - Mid-year in June, check in with Mentorship Director to have experience survey sent out in July and collect more data points
- Incorporate into presentation

Bootcamp

- Meet with the Director of Bootcamp on an annual basis to collect data
 - During Bootcamp Registration, collect demographic information on the attendees
 - During the Bootcamp lunch hour, ask attendees to fill out survey
- Collect data points & incorporate into presentation

Quarterly Networking Events

- Meet with Program Director on a quarterly basis to collect data
 - During Events registrations, collect demographic information on the attendees
 - During the event, before the Q&A session, ask attendees to fill out a brief survey (create template survey)
- Collect data points & incorporate into presentation



Mentorship

Mentorship Committee Responsibilities

- Grow the Mentorship Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting
- Develop a yearly plan of events to keep mentors & mentees engaged with the organization throughout the year (at least one event per quarter)
- Request testimonials from Mentorship Program participants by late August to promote the Mentorship program in Q4 during the Bootcamp and while the application/registration period is open

Phases:

- 1. Creating application & opening registration**
- 2. Match-making**
- 3. Launching the Mentorship Program**
- 4. Bi-annual Networking**
- 5. Collect Testimonials**
- 6. Reopening Registration**
- 7. Close out Program**

Programs

Programs Committee Responsibilities

- Grow the Program Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting
- Lead and coordinate Quarterly Networking Events & A Day in the Life Series
- Create Yearly Events Agenda, coordinating with other members, & stick to it as closely as possible
- Coordinate with guest speakers, giving them a standard brief introduction of our organization, setting the standard for professional caliber of our organization, setting the agenda together for their event, & giving them marketing materials for the event for them to promote among their networks
- Coordinate with Marketing Team with appropriate time before the event (at least one, ideally two or more months) for them to have the marketing materials & timeline ready
- Create slideshows for the events and coordinate who within team will MC or participate
- Record our events for social media purposes, making appropriate disclosures in Eventbrite registration & at the beginning of the event

Phases:

1. Create Yearly Events Agenda for Retreat

2. Logistics for Event Planning

3. Speaker Coordination

4. Marketing Coordination

5. M.C. for events

6. Recording the event

Associated Role: Video Editor

(Intersects with Programs Committee)

7. Gather Member data and surveys post-event



Scholarship

Scholarship Committee Responsibilities

- Grow the Scholarship Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting
- Lead and coordinate the Scholarship Process - preparation, application, announcements, and important follow up

Phases:

1. Scholarship Application Preparation and Marketing
2. Scholarship App Organization
3. When Scholarship App review
4. Preparing for Bootcamp Scholarship Announcement
5. Post Announcement Marketing and Data Gathering



Sponsorship

Sponsorship Committee Responsibilities

- Grow the Sponsorship Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting

1. Point of Contact for potential & existing sponsors

2. Existing Sponsors Relationship Management

3. Create Prospective Sponsor Pipeline

4. Maintain the sponsorship package up to date

5. Coordination with rest of team for Sponsorship Opportunities

6. Sponsor review and strategy presentation during retreat



Operations

Operations Committee Responsibilities

- Grow the Operations Committee as necessary, & coordinate committee to meet outside of the monthly LIF meeting
- Support smooth flow of functions throughout our organization

Strategy Operations

- Work closely with the President to make sure things are running smoothly
- Help President identify bottlenecks & suggest more efficient ways of operating as a team
- Stay on top of the agenda for the year, acting as a Quarterback for the President to ensure we're staying on track and tasks are getting done in a timely manner
- If necessary, create an Operations Flow Chart to help our team understand how to work cohesively & who their points of contacts for different needs. How should our team members and committee interact with each other to get tasks done?

Technology Operations

- Point of contact for team regarding technical issues
- Lead technical run-throughs for Bootcamp speakers in September

Organizational Operations

- Work side by side with National Secretary to ensure our files are organized and easily accessible
- Manage the intranet and ensure team members are transferring files for organization continuation purposes



Thank You!

Questions?

<https://www.latinosinfinance.org/join-lif>

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