

Volunteer Management Manual



Add the volunteer's name here

Add their position and volunteer assignment

Add your organization's name, address, website, phone number, email

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** **Please note:** The table of contents and materials contained within your Volunteer Management Manual will differ based on your organization and volunteer program. If necessary, add some additional contents where necessary in order to tailor it to your specific needs. As an example, it is likely that you will have more than one Volunteer Position Description to include within the manual.*



Welcome Message

Dear Valued FPA Volunteer,

Thank you for volunteering with the Financial Planning Association. It is a pleasure to have the opportunity to work with you and we are thankful for the commitment you have made to join our team. As a volunteer, your contributions and dedication are vital to whom we are as an organization and the services we are able to provide.

This Volunteer Management Manual is designed for you as an introduction to our organization and the diverse opportunities available to our volunteers. You are encouraged to review the manual as it will serve as a valuable resource during your term as a volunteer.

We appreciate your willingness to make a difference and look forward to working with you during the year ahead.

Sincerely,

Christine Richardson, FPA Volunteer Engagement



Organization Mission

The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services providers and students who seek advancement in a growing, dynamic profession.

FPA members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve and take part in FPA's One Connection™ for professional education, business success, advocacy and community at the national and chapter levels. FPA is truly an indispensable force in the advancement of today's CFP® professionals.

Committee/Chapter Mission/Vision

Add information about your committee/chapter here



Committee/Project Vision

- Include information about your chapter or committee's or project's vision here



Organization History

Include information about the organization's founding principles. Examples below include:



Member Profile

At FPA, we help connect all members – CFP® professionals, financial planners, academic leaders, students, individuals and companies who are part of the financial planning profession – in a variety of unique and compelling ways.

Add a few lines about the demographics of your chapter, committee, volunteer group or community served.

Volunteer Opportunities

Describe the types of positions and positions available. Don't get into "job descriptions", as that is the next step.



Volunteer Position

Now you provide the specifics. Here is an example of an FPA national volunteer position description.

Seeking

Diversity Committee 2015 Members

Type of Opportunity

National

Sign-up [Close](#) Date

12/12/2014

Interest Area

Diversity

Contact

Time Commitment

Year-Long Commitment

Travel Required

No travel required

Description

FPA is dedicated to providing [knowledge](#), advocacy, community, and leadership to all those who need, support and deliver professional financial planning. FPA believes that everyone, no matter what their situation or [economic status](#), can benefit greatly from the experience and advice of a competent, ethical financial planner.

Join the Diversity Committee to help spread the word about the need for diversity within the [financial](#) planning profession and the communities served. The Committee focuses on local and national education, the Diversity Scholarship, working with like-minded groups, and more.

Learn more about [FPA's Diversity Initiative](#).

Task Deadline

n/a

Level of Effort

No sweat..may be a bit!

No. Of Volunteers Needed

12

Recognition and Rewards

Depending on your assignment, you'll either be working with FPA or your chapter to determine what kinds of awards and recognition are available to the volunteers you work with. Check with them, and adjust the language below to fit your situation.

Because we appreciate the dedication and countless hours given through volunteer service, we have developed a volunteer recognition and reward program. Rewards are awarded throughout the year, both nationally and locally.

Level of Service	Reward
All levels	Participation Certificate, Recognition on FPA Website
Local	Complimentary attendance to chapter symposium event
National	Discounted admission to FPA's annual conference

