



## Women's Money Matters Advisory Group Overview

The WMM Advisory Group serves as a critical community champion of the organization. Members of the Advisory Group share in the WMM mission by providing the organization with professional expertise; diverse knowledge of constituent perspectives; connections to local, state and national resources, colleagues or peers; philanthropic support or other forms of needed assistance.

### Membership:

- Members of the WMM Advisory Group are appointed to provide advice and support to the organization based on diverse skills, experience, and/or contributions
- Advisory Group members are different from the Boards of Directors in that they don't have governance or fiduciary responsibility. Instead, members support as partners with the organization, representing the community and helping to achieve WMM goals including advice, recommendations and feedback
- Prospective new members are identified by Women's Money Matters' team, board, supporters, or other Advisory Group members

### Organizational Structure:

- The Advisory Group consist, on average, of between 20-30 members
- The WMM Director of Advancement manages the Advisory Group with the Executive Director who also attends AG meetings
- The Advisory Group meets approximately 4x/year
- A board liaison may attends Advisory Group meetings and serve as liaison to the Women's Money Matters board
- Members will serve as ambassadors, advocates and advisors

### Responsibilities:

- Meetings: attend at least 50% of annual meetings and special gatherings including attending special events representing WMM
- Act annually in some significant way to support the organization's mission (e.g. expert advice, door opening, funding or fundraising)
- Keep informed about plans, activities and needs of the organization
- Advise on programs, potential partnerships, and organizational planning
- Contribute expertise to current and future work of Women's Money Matters

- Provide engaged support for Women's Money Matters' work
- Members would be available for occasional phone calls from the team for advice
- Members assist in identifying community engagements for Women's Money Matters
- Members help advance Women's Money Matters fundraising activities and help with event planning and execution

**Sample Areas of Engagement:**

- Strategy
  - Advice and feedback on strategic plans
  - Insights on sustainable growth model to scale for transformative impact
  - Input and guide brand discussions
  - Feedback on diversity, equity, inclusion, access and belonging plans/resources
- Curriculum and Learning: Advise on curriculum updates and interactive online learning
- Networking
  - Lean into social and professional circles to support donations and awareness
  - Attend events on behalf of WMM
  - Insights on an event strategy and execution support
- Social Media
  - Social media guidance and expertise
  - Interact with all WMM social media for maximum exposure
- Offer policy research and advocacy expertise as relevant
- Research: Stay informed of industry trends, regulations, and other related news and events
- Raise funds: Use tools like peer-to-peer fundraising to fundraise on behalf of an organization

Individuals interested in joining the Advisory Group can contact **Deborah Cutler-Ortiz** Director of Advancement [dcutlerortiz@womensmoneymatters.org](mailto:dcutlerortiz@womensmoneymatters.org)

