

Welcome Committee Charter

Name of the Committee/Task Force:

The name of this committee is 'The Welcome Committee.'

Purpose

The purpose of the Welcome Committee is to use a personal touch to offer a very warm "Welcome" to our new CLFPs and Associates who are joining our CLFP Family.

Scope and Responsibilities

The Committee is responsible for making phone calls and/or emailing our new CLFPs and associates. The CLFP Foundation staff will provide a contact list (name/designation type/email/phone number) to the Welcome Committee Chairperson, who will distribute the list among the Welcome Committee Team Members.

Membership

Composition

The committee will have at least five members but no more than 10.

Membership will include a chairperson and any vetted/nominated CLFPs in good standing who have expressed interest in the committee. Tracey Elfering will also serve as the Board Liaison with the Welcome Committee.

Selection

Members will be selected after being vetted by the CLFP Vetting Committee and then passed on to this committee for review on an annual basis.

There will be no specified term length for anyone wishing to serve on the Welcome Committee.

Roles and Responsibilities:

Chair: The chairperson will lead the committee, distribute the call lists, set agendas, and preside over meetings.

Board Liaison: Will report on committee activities to the CLFP Foundation Board of Directors at monthly meetings and as needed throughout the year.

Committee members: The committee members will assist with outreach to New CLFPs and Associates and will perform other roles as needed or assigned.

Meetings

The committee will meet bi-monthly (as needed).

Meetings will be held virtually for at least 15 minutes but no longer than 45 minutes.

Reporting

The committee will report updates to the CLFP Board of Directors monthly. Updates should come from the Board Liaison and be communicated before monthly Board meetings.