FPA Chapter Diversity & Inclusion provides knowledge, advocacy, community, and leadership to all those who need, support, and deliver professional financial planning.

chapter diversity & inclusion rubric initiatives to help your chapter meet your diversity & inclusion goals

FPADiversity@OneFPA.org
LEADERSHIP INITIATIVES

- Chapter leadership participates in (D&I) initiatives in the calendar year.
- Board participates in a D&I recruitment & retention training one time each calendar year.
- Nominate diverse chapter board members to your board when nominations occur.

BOARD ADMINISTRATIVE INITIATIVES

- The chapter elects a Diversity & Inclusion Officer to the Board of Directors.
- D&I Officer is included on board meeting agenda and gives an update on current diversity initiatives.
- Diversity & Inclusion is included on leadership strategic planning meeting agenda.

COMMUNICATION INITIATIVES

- Once per quarter, Leadership has communicated D&I statement, strategy, & initiatives (internal & external) to membership through communication channels (newsletter, social media, etc.).
- Spotlight chapter activities impacting diverse populations within community.

POLICY INITIATIVES

- Create a D&I statement specific to chapter initiatives.
- Create a recruitment policy with a section dedicated to recruitment and retention of diverse members, specifically that reflects the diversity of the community it serves.

VISIBLE INITIATIVES

- At least once per year, the chapter participates in programming with a community or national minority financial planning organizations (e.g. community or national based AAAA).
- Once per year, the chapter observes no fewer than one diversity related milestone and/or event (e.g. Black History Month, Women’s History Month).
- All marketing materials include pictures of diverse individuals.

LEARNING INITIATIVES

- Chapter membership attends programs that include diversity related content or are selected with diversity related considerations during the calendar year.
- Speakers from diverse populations present on topics and issues impacting diverse communities related to the financial industry.