



Women in Finance®

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# VOLUNTEER HANDBOOK

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First Edition – October 1, 2019

100 WOMEN IN FINANCE

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## Welcome

Dear 100 Women in Finance Volunteer:

Thank you for your decision to volunteer as a 100 Women in Finance committee member. We appreciate and deeply value your commitment to the organization, and expect that you will receive personal and professional rewards from the time you spend volunteering for 100WF.

We remind you that we are a network of professionals in the finance and alternative investment industries working together **to empower women at every stage of their careers**. This guiding principle informs all aspects of our efforts to produce educational programming, to enable peer engagement and to impact both the finance industry and career opportunities for young women in the communities where our members work and live. Over the years, we have developed time-tested standards that enable consistent program quality, member satisfaction and operational efficiency across our global locations. Thank you for reading this handbook to learn more about your role as a 100WF volunteer.

We are delighted that you have taken advantage of the opportunity to both to lead and serve your 100WF location, and to extend your engagement and goodwill toward our global community.

Sincerely,  
Amanda Pullinger  
CEO

## Acknowledgements

100 Women in Finance expresses appreciation to the following 100WF members and staff for their helpful contributions toward the compilation and editing of this Volunteer Handbook.

Jennifer Albert  
Sherrie Beehler  
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## Introduction to 100 Women in Finance

### Vision

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100 Women in Finance operates under a global vision of “30x40,” in which women occupy 30% of investment team roles and executive positions by year 2040. *(Adopted by the 100WF Global Association Board, September 2019).*

### Mission

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100 Women in Finance strengthens the global finance industry by empowering women to achieve their professional potential at each career stage. Our work inspires, equips and advocates for a new generation of industry leadership, in which women and men serve as investment professionals and executives, equal in achievement and impact. *(Adopted by the 100WF Global Association Board, September 2019).*

### Founding and Early History

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100WF was founded in 2001, when three women working at hedge funds had a novel idea: bring together 100 female investment professionals to better lever their collective relationships and enhance communication within the alternatives industry. With an inaugural education event in New York City, they launched the group and called themselves “100 Women in Hedge Funds.” In the following months, the founders identified three areas where collaborative efforts could effect change in the industry and beyond: Peer Engagement, Philanthropy, and Education.

A simple idea became a powerful mission and rippled through the industry – drawing members from hedge funds, but also alternative investments more broadly as well as the wider finance industry. From the beginning, the 100WF model has been practitioner- and volunteer-driven. With a small staff and a volunteer global governing board, the organization boasts 500 active volunteers who implement the mission across 24 locations on four continents.

### Recent History and Milestones

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In late 2016, the organization formally re-branded to become 100 Women in Finance. This rebranding expressed a more inclusive membership across the financial spectrum – including all forms of alternative investments (hedge funds, private equity, venture capital, real estate), the traditional long-only industry, as well as new iterations of finance, such as FinTech. This desire for broader membership also reflects our open door to members who occupy any place on the

industry's traditional – or nontraditional – career path, from early stage through retirement, and all points, turns and pauses in between. Anyone who wishes to support 100WF's mission – women and men – are encouraged to become members.

In 2019, 100WF evolved the the pillars of its core enterprise to be Education, Peer Engagement and Impact (evolved from former Philanthropy pillar). With its Impact pillar, 100WF works to strengthen and diversify the finance industry's investment and executive talent, and create purposeful pathways toward careers in finance for pre-career young women of all backgrounds.

At this stage in 100WF's history, we are proud that our volunteer members have raised nearly \$50 million USD (gross) for charitable and partner organizations aligned with our mission, and have produced 1,000+ educational events.

Today more than 15,000 members in 24 locations around the world can say, "I'm part of the 100WF community."

### Organizational Philosophy and Culture

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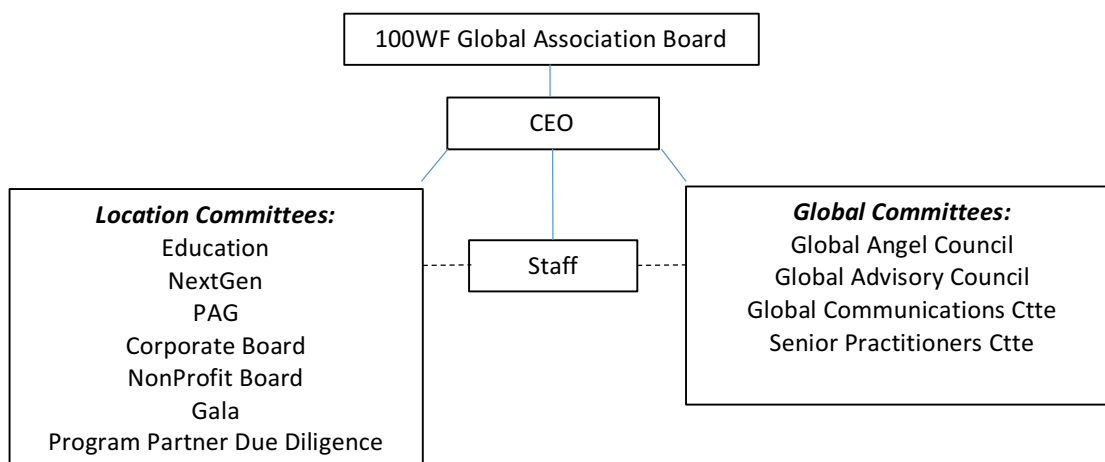
From the very beginning, 100WF has been guided and supported by professionals in the finance industry who serve as volunteers on our local committees, on our Global Advisory Council and our governing Global Association Board.

Our volunteers are the cornerstone of our global community. We've found that those who participate actively in the organization, benefit most from the organization. Participation may take the form of serving on a committee, recruiting speakers or speaking at one of our education or NextGen Group events, or encouraging their firm to buy a table at one of our philanthropic Galas or to host or sponsor one of our events around the world. Being a 100WF volunteer requires an investment of time and effort but our volunteers consistently find that the rewards of their work with 100WF, both profession and personally, will last a lifetime.

We also recognize that members have active lives beyond their work, and that means that their volunteer engagement, support of the organization and event attendance can vary over time. We expect our members' lives will go through seasons and careers may pause or transition for any number of reasons. We consider anyone who has joined the organization to be an equally valued member, regardless of their level engagement or their current employment status.

## 100WF's Organizational Structure

100WF is a non-profit organization registered in the United States, formed to further the organization's mission and manage its affairs. The organization's principal management stakeholders are noted here.



### Board

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100WF is a non-profit organization governed by the 100WF Global Association Board. The Board sets strategic objectives, develops global policies and oversees finances. The CEO reports to the Board and carries out the strategic plans and priorities of the organization. The Board governs all 100WF legal entities, established as needed, to achieve the organization's mission and comply with regulations in global locations in which 100WF operates. The Board meets quarterly, usually in New York, where the organization is headquartered.

The standard term of a Board member is three years, with the potential to renew for another three years. Executive Committee members may serve longer. The Board welcomes nominations from members wishing to nominate themselves, or others, for board service. Nominations, with candidate details, may be sent to chair of the Board's Governance committee, at any time, addressed to [board@100women.org](mailto:board@100women.org).

A complete list of the current composition of 100WF's board of directors is [here](#).



## Staff

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The CEO manages the staff to support the CEO and 100WF volunteers to achieve the organization's mission. The staff supports the volunteer committee members who develop and execute 100WF's Education, Peer Engagement and Impact events and initiatives across 100WF locations globally.

Under the oversight of the CEO, the 100WF staff are responsible for both regional and global functions, as outlined below. Individual staff members can be reached according to their first names, such as [jane@100women.org](mailto:jane@100women.org). Most of the staff works from the eastern time zone of the US (NYC), and others work from London and Singapore. Work arrangement range from full-time, to part-time, to project-based. Volunteers who are unsure where to direct an inquiry may send a message to [staff@100women.org](mailto:staff@100women.org) and the appropriate person will respond.

The 100WF staff and their general responsibilities are as follows (as of September 2019):

<b>Amanda Pullinger</b> <i>Amanda@</i> <i>CEO@</i>	CEO – defines priorities and allocates resources; manages the staff; official spokesperson for 100WF; oversees Leadership Council and strategic priorities
<b>Alexandra McGuigan</b> <i>Alexandra@</i>	Director – APAC
<b>Alexis Belladonna</b> <i>Alexis@</i>	Director of Peer Engagement Initiatives and Location Innovation (NextGen Groups, MidCareer pilot, Senior Practitioners Group), and Director of Next Generation Initiative
<b>Ann Henry</b> <i>Ann@</i> <i>COO@</i>	COO – manages 100WF finances and operations, including membership, systems; staff liaison to the 100WF Global Association Board and related boards; Angel liaison
<b>Brigitte Spinthourakis</b> <i>Brigitte@</i>	Membership Coordination and Invoicing
<b>Carolina de Brigard Wey</b> <i>Carolina@</i>	Event Coordinator – North America
<b>Ian Curry</b> <i>Ian@</i>	Technology, Web Site
<b>Janet Falk</b> <i>Janet@</i>	Event Invitation Editor - Global
<b>Katie Hebert</b> <i>Katie@</i>	Global Leadership Council and corporate engagement support
<b>McKenna Forrest</b> <i>McKenna@</i>	Global event administration and PA to the CEO
<b>Sarah Dyer</b> <i>Sarah@</i>	CMO – oversees marketing & communications, media, external partnerships & conferences, investment manager visibility
<b>Zara Jamil</b> <i>Zara@</i>	Director – EMEA

## Global Committees

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100WF operates a number of global committees which work with the CEO to perform strategic tasks, provide feedback and engage in member outreach, as needed.

### Global Advisory Council

100WF's Global Advisory Council is a group of senior members from around the world who work with the CEO to serve 100WF in an ambassadorial capacity. The Council's responsibilities include representing the global organization within each location's membership base, reaching out to new members and Angel supporters, and engaging with external program partners, as needed. The term of service for a Global Advisory Council member is two years, with a maximum of six years. Members interested to serve on this committee should send an inquiry to the CEO or to the chair or region leaders of the Global Advisory Council. The current constituents of the Global Advisory Council are found [here](#).

### Global Angel Council

100WF Global Angel Council, which is chaired by an Angel member of 100WF, creates special programming and engagement opportunities for Angel supporters of 100WF.

### Global Communications Committee

The Global Communications Committee exists to partner with the CEO and CMO on special global communications projects. It is chaired by a senior member and constituted by volunteers who contribute content to, and feedback regarding, 100WF's global communications platforms. The current constituents of the Global Communications Committee are found [here](#).

### Other Global Committees

100WF additionally operates a global Senior Practitioner Committee and a Professional Image Committee, as well as other global committees, as needed and desired.

## Location-Specific Functional Committees

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Each of 100WF's global locations is run by a set of functional committees, aligned with each of 100WF's pillars. Larger, mature locations, typically operate each of the following committees. Smaller, newer or revitalizing locations may simply have a "main" committee to oversee the location's events. All of these committees follow global performance standards and are supported by CEO, the staff and the Global Advisory Council.

Standard 100WF Committees are:

- Education Committee

Certain locations will also operate committees to oversee large-scale fundraising events or by-invitation-groups, which are designed for small groups of members around focused interests and eligibility criteria:

- Gala Committee
- Program Partner Due Diligence Committee
- NextGen Group Committee
- Peer Advisory Group (PAG) Committee(s)
- MidCareer Bridge Committee [Pilot Program]

Certain large locations may also operate committees to support key 100WF strategic initiatives:

- FundWomen Conference Committees
- Corporate and Private Board Committee
- Non-Profit Board Committee

## Our Three Pillars

All 100WF's activities and initiatives reflect our three core pillars – Education, Peer Engagement and Impact. Details on best practices and guidelines for event execution for planning of activities under each pillar are available separately (see EMS for details).

### Education

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Education events are the backbone of 100WF's programming and what we believe distinguishes the 100WF brand from other women's professional networks. Our Education events are known for strong industry content, opportunity for encounter with speakers and peers, and relevance to our members' professional lives.

Our Education pillar serves the largest number of our members. We produce approximately 150 industry Education events per year across our global locations. These events are open to members who are current with their Access fees.

These features distinguish 100WF Education events:

- They are created and executed by our volunteers, who are all industry professionals with deep and current knowledge of industry and market trends. This means 100WF constantly evolves its programming to reflect our members' interests. We benefit from members' access to industry speakers whom they know personally. As a result, we produce events on topics that are current and relevant, featuring speakers who are experts in their particular field.
- Our members can attend 100WF Education events across the globe for one annual access fee (Global Premium membership is required for priority admission in New York, London and Hong Kong). This means members who travel can take advantage of opportunities to attend our events and meet members in different locations. Our events are always in English, enabling global members to fully participate.
- Unlike most finance industry conferences, our events are predominantly attended by women and will always aim to feature a woman on every panel. This makes a significant difference in several ways. Members feel comfortable walking into the room because they see their peers. This format also yields more women participating in post-panel networking.
- 100WF events are typically off-the-record and not of attribution. This feature allows our speakers and attendees greater confidence in speaking frankly, and about topics they might not wish to address publicly, enriching discourse.

Our many years of experience producing high-quality programming has taught us what makes an education event successful:

- featuring high-profile speakers
- highlighting female investors

- providing a minimum of six-weeks advance notice

Please note that in the US, 100WF may not host speakers who are running for election or reelection to political office.

In smaller locations, where it can be particularly challenging to produce a series of large scale education events, or in cities without official location status, it may be more effective to orchestrate smaller education events/gatherings (such as senior practitioner dinners or breakfasts) that include desirable speaker and allow for cross-table discussion. Such events are equally valued to our members, and are encouraged where practical.

### Collaboration with Other Organizations

There are many finance industry organizations that produce education and networking programming in the locations where 100WF operates. Some are focused on diversity and inclusion, and others on finance education and networking more broadly. 100WF is keen to collaborate with these organizations when the right opportunities present themselves.

100WF does not, however, co-host events with other organizations. We have found that co-hosting presents challenges we wish to avoid. For example, other organizations have different approaches to charging for events, different RSVP processes and systems, and often different standards for event execution. We wish for our brand to stand alone in the market.

The best way for a local committee to collaborate with another organization is to maintain and open dialogue other organizations' local chapters, so as to avoid competing dates and topics (where possible). If capacity exists at a 100WF event and the location wishes to include members of an external organization as guests, it may do so (guest list to be provided to the 100WF Event Organizer). If an external organization wishes to offer seats at their event to 100WF members, a similar arrangement can be made. In such cases, the external organization's event can be posted to 100WF's Community Board and RSVPs from 100WF members should be processed by the external organization. In other circumstances, 100WF may be willing to extend an email invitation to a location's 100WF members, but firm guidelines apply. Please refer to our Special Invitations policy for additional details.

### Speaker Gifts

100WF does not traditionally provide gifts to speakers and maintains no budget for this purpose. Speakers should be thanked by event organizers at the event, and afterward via a written thank you note. Additionally, speakers are thanked via 100WF's social media posts. Questions about this policy should be directed to Event Coordinators, and exceptions to this policy must be pre-approved by the COO.

## Speakers with Commercial Interests

Many 100WF speakers are providers of professional services or authors. Presentation to a 100WF audience and the global reach of our communications is a compelling opportunity for the speaker's brand building and indirect marketing. Speakers should be advised to exert caution and avoid hard-sell messaging, as it compromises their credibility with our audience and is not in keeping with 100WF culture and participant expectations.

Authors on book tour can be very desirable speakers. Such speakers often require an ability to sell books as a condition of speaking at an event. In these cases, 100WF prefers to provide a link to an on-line bookseller in the event invitation, which reaches thousands of members, including those not attending the event. This invitation and link, of course, will also appear on 100WF's global public website. Some authors require a minimum sale commitment in order to speak. While it can be challenging for volunteers to orchestrate, 100WF can accommodate a pre-sale of books via payment link for pick up and author signing at the event. The latter option requires additional planning time for execution. Volunteers should communicate with their Event Coordinator to discuss logistics.

## Peer Engagement

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Our Peer Engagement pillar has two elements – internal peer- to-peer connectivity, and facilitation of connectivity between the diverse talent in our membership and external parties, such as the media, conference organizers and talent identifiers for special professional opportunities.

### Internal Peer Connectivity

100WF believes that peer connections are essential to developing and sustaining a satisfying career – throughout all its stages – and we have created internal by-invitation groups that assist members in forming these important relationships. In many of our global locations, 100WF offers member-led Senior Practitioner (for members with 20+ years of professional experience), NextGen Groups (for members are in the first decade of their careers) with programming designed around the needs and interests of these cohorts. In late 2019, 100WF launched a MidCareer Bridge pilot group in London for those in the intervening years to determine the best way to address and serve members in these challenging “middle” career years.

Developing targeted peer engagement programming for Senior Practitioner, MidCareer or NextGen-eligible members is most successful in locations where the membership is sizable enough to warrant segmentation.

Many locations will desire to host networking events for their local members. Any event that involves a shopping, spa or beauty angle must include business content, such as a keynote address with the founder of the business or a senior executive, and/or a philanthropic

component in which a meaningful percentage of the sales is directed to 100WF's Investing in the Next Generation initiative or the local program partners. In the interest of maintaining 100WF's image as a business-focused organization, there should no more than one shopping, spa or beauty event per location per year.

### External Peer Connectivity

100WF also facilitates career-empowering connections for members through staff-led/supported initiatives aimed at bridging some of the most challenging opportunity gaps for professional women in the financial sector: access to capital allocation, appointment to public and private corporate boards, representation in the media and on industry conference podiums, and visibility of stretch or non-traditional career growth options. 100WF's strategic priorities in this area include our FundWomen umbrella initiative which is composed of our global Female Fund Manager visibility initiative and our FundWomen conference series, our Corporate Board initiative, and our active Job Board.

Each of these programs are discussed elsewhere in this manual.

### Impact

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100WF creates Impact in two ways. We work to strengthen and diversify the industry's investment and executive talent, and we create purposeful pathways toward careers in finance for pre-career young women of all backgrounds.

#### Impact within the Finance Industry

100WF's Impact efforts in the finance industry address the persistent underrepresentation of women in investment team and executive roles. Despite sincere effort by industry leaders to improve the industry's demographics, female representation in key roles has not improved and professional specializations remain largely genderized.

100WF's Impact work within the industry includes:

- Promoting the finance industry – particularly investment roles – as a career destination of choice for pre-, early- and return-career female candidates
- Identifying and sharing best D&I practices to further women's recruitment, retention and advancement
- Promoting the visibility and credibility of female investment professionals in the public sphere, specifically at industry conferences and in the media
- Supporting the business interests of female investment professionals via our FundWomen investment conference series, enabling stronger connections between female fund managers and capital allocators

## Impact with Pre-Career Women

Our Impact work with pre-career young women is also a worldwide initiative, and will be led by a Global Director of Next Generation Initiatives. In order to meaningfully increase the number of women who enter the finance industry – particularly on tracks toward investment roles – we believe that we must exert stronger influence on teenage girls to look favorably on finance industry careers, and do so at far greater scale. We also believe that we must target young women of all backgrounds – not only those with elite educational opportunities and family connections to the finance industry. 100WF members are ideal role models for pre-career young women, and will play a critical role in the achievement of this aspect of our mission.

100WF's outreach to students (high school through university) must, in order to be effective, take different forms in different locations, in response cultural diversity, differences in education systems, and access to resources. For optimal impact, we collaborate with local program partners with expertise in serving youth populations and with direct access to schools. In certain locations, 100WF also may also appoint local/regional Next Generation coordinators to liaise with local program partners and facilitate the engagement of local 100WF members as role models and mentors.

Examples of 100WF's Impact Pillar in service of pre-career young women include:

- 100WF First Impressions events, in which teenage girls and their guardians are invited to attend a gathering of their peers and female role models from the finance industry to learn about career options, and to be inspired by the possibilities.
- Placement of 100WF member role models and speakers in local schools
- Support of local organizations that work directly with teen girls to enable their academic and social/emotional preparation for careers in the finance industry
- Scholarships for finance study for disadvantaged female students
- Support of and collaboration with external organization's efforts to expand the number of young women in investment roles (Women Who Quant, CAIA, Girls Who Invest, Smart Women Securities, Portfolios With Purpose, business school programs, etc.)

## Fundraising for Impact

Beginning in 2020 all 100WF's fundraising efforts will be dedicated to the achievement of 100WF's mission. Proceeds from 100WF's fundraising events (such as Galas or mini-fundraisers) will fund 100WF's proprietary programs or Board-approved external program partner organizations with whom 100WF collaborates to fulfill our mission. Program partner organizations are identified based on local needs and through a rigorous due diligence process, directed by 100WF's Global Director of Next Generation Initiatives and supported by volunteer Due Diligence Committee members.



Fundraising activity is generally subject to oversight by local regulatory authorities. Before volunteers in a location may fundraise under the 100WF name in support of our Impact pillar or an external organization, the volunteers must obtain approval from the CEO. The 100WF Global Association Board must approve all program partners prior to any fundraising and after completing operational and legal due diligence on that partner. 100WF does not fund political, religious or governmental organizations.

The 100WF philosophy is that funds raised in a location be granted to program partners in that location. Accordingly, funds raised in the US are granted to US program partners, funds raised in Hong Kong are granted to Hong Kong-based partners, etc.

### Galas

Our members are likely familiar with our annual Galas, which serve as our largest engine of annual fundraising. All members are welcome to support the 100WF Galas and fundraisers organized in approved locations.

Volunteers who wish to produce a 100WF Gala are advised that 100WF has a very specific process for identifying and approving funding of program partners in a particular country.

100WF may support one or more external program partners (which are typically non-profit organizations) each year in each country where a Gala is produced. The external organization must align with 100WF's mission and Impact pillar, it must be locally-registered and providing services in the country where the Gala fundraiser takes place. The organization must be screened via 100WF's standard application and approval process. More details on this process may be obtained through the 100WF staff.

### Other Fundraiser Events and Approaches

Smaller scale 100WF mini-fundraiser events are permitted and can be quite successful. For example:

- A location might wish to support a locally organized breast cancer walk/run for charity, by creating a 100WF team. 100WF staff will consider these request, provided that organization of the walk/run and the funds collected are both directly coordinated by the charity organization (i.e. not using 100WF resources to administer the payment system or other aspects of administration of the walk/run).
- A location with approved program partners may wish to host a mini-fundraiser, such as a networking cocktail event or a film screening, with a required or suggested minimum donation.
- A location with an approved program partner may wish to produce an event in a retail store or spa. In such cases the host should make a donation to 100WF or its program partner and a meaningful percentage of the event's proceeds should be donated to

100WF's program partner(s). The success of these events - for both the host and the program partner - require that members buy merchandise or services. This expectation should be very clear to all invitees. Shopping and spa events, should be produced sparingly (1x/year), with confident expectations for strong revenue. Our experience suggests that these events are not appropriate for NextGen Group programming.

- Members participating in a marathon (or other significant challenge) to benefit one of 100WF's approved program partners or past beneficiaries may inquire about promotion assistance via 100WF's social media platforms. A list of 100WF's historical beneficiaries can be found [here](#).

Volunteers keen to engage in charitable activities are reminded that philanthropy, broadly speaking, takes many forms. Locations which desire to engage with members and the local communities without raising funds might consider one of the below suggestions:

- Produce occasional education events on philanthropic or social-benefit themes, particularly those relevant to the finance industry, for example, microfinance or ESG investing.
- Fireside Chat speakers can be queried by moderators about their personal priorities, including their own community service or philanthropy.

## Strategic Programs

100WF's Global Association Board will periodically identify themes for the CEO and staff's programmatic focus. Below are some of 100WF's current priorities.

### Investing in the Next Generation

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This initiative was launched in 2015 with the objective to present the financial industry as a compelling career choice for young women and to provide a network for members in early-stage careers. The key aspects of this initiative are:

- By-invitation NextGen Groups.
- Mentoring programs in select locations which pair 100WF members with young professionals or students, such as Girl Force 100 (Cayman Islands) or Maths4Girls (UK)
- First Impressions events for teenage girls featuring role models from our membership
- Funding for and collaboration with external organizations that share common purpose, such as Forte Foundation, Girls Who Invest and Smart Woman Securities

Additional details about this initiative can be found [here](#).

Volunteers interest in initiating any of the above activities in your location should [contact](#) 100WF's Director of Next Generation Initiative for guidance and resources.

### FundWomen

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FundWomen is 100WF's umbrella campaign to elevate the public profile of female investment professionals, and to enable stronger connectivity with institutional investors and allocators. FundWomen has two project sleeves that tie together for greater impact – Female Investment Professional Visibility and our global investment conference platform.

#### Female Investment Professional Visibility

In 2018, 100WF launched a campaign to elevate the visibility of female fund managers. The Female Fund Manager directory is posted on 100WF's public website as visual representation of the presence of female investment talent in the finance industry. The audience for this initiative is the community of institutional investors, the media, and teenage girls and university students who are forming career ambitions and would benefit from exposure to role models from the finance industry.

100WF uses this directory to increase the diversity of voices at industry conferences and in the media. Members are asked to [refer](#) eligible female fund managers to 100WF for inclusion in our on-line directory, and to refer to this list when sourcing speakers for events.

Volunteers who wish to introduce the media, conference organizers or capital allocators to women featured on 100WF’s directory should notify the [Chief Marketing Officer](#) for immediate assistance.

## FundWomen Investment Conferences

100WF organizes FundWomen investment conferences that introduce capital allocators to female portfolio managers to explore business opportunity. These conferences originated in 2014 in Northern California and are produced by senior 100WF volunteers and the 100WF staff. Annual 100WF conferences now occur in San Francisco, New York and London and are attended by a wide variety of portfolio managers and allocators. An exploratory APAC FundWomen Conference committee has been formed.

These half-day conferences are typically hosted in collaboration with a Leadership Council member firm or other financial firm. Participation in these conferences is generally by-invitation. Often, a 100WF education event for the general 100WF membership is scheduled in conjunction with a FundWomen conference and features conference participants, with an open invitation to all members.

Members wishing to speak at or attend one of these conferences, either as a fund manager or as an institutional allocator, should contact the relevant committee:

San Francisco	<a href="mailto:conf-sf@100women.org">conf-sf@100women.org</a>
London	<a href="mailto:conf-london@100women.org">conf-london@100women.org</a>
New York	<a href="mailto:conf-ny@100women.org">conf-ny@100women.org</a>
APAC	<a href="mailto:conf-APAC@100women.org">conf-APAC@100women.org</a>

Volunteers are asked to help encourage participation in these conferences, and attend if relevant to one’s role and interests. Volunteers who wish to launch a 100WF FundWomen investment conference in their location should contact the CEO.

## Corporate and Private Board Initiative

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100WF’s Corporate and Private Boards Initiative connects qualified candidates from within our membership with corporate director opportunities. In certain locations, special Senior Practitioner programming furthers this initiative. Any member who seeks a corporate or private board appointment is encouraged to complete 100WF’s questionnaire, which enables the staff to track members who desire directorships and make appropriate introductions. This [questionnaire](#) is found on the website.

## Non-Profit Board Initiative

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Our 100WF Non-Profit Board (NPB) Initiative committee connects candidates from our membership with non-profit directorship opportunities. These members will also receive invitations to events and programs produced by the NPB and the board with which the committee works. The 100WF Non-Profit Board Initiative currently focuses on non-profit organizations in the New York City, Connecticut and Boston locations, though any member is welcome to participate.

Volunteers should encourage interested members to complete 100WF's Non-Profit Board questionnaire, which enables the committee to track member interest and make appropriate introductions. This [questionnaire](#) is found on the website. Members who have expressed interest by completing a questionnaire will receive invitations to events and programs produced by the NPB and the board with which the committee works.

## By-Invitation Groups

100WF produces programming targeted at specific groups within our membership. These groups are defined by specialized interests, professional function or career stage. These volunteer-led groups are open to members in good standing, but are by-invitation according to the member's qualifications. 100WF's management sets the qualification criteria for participation in these groups, and all members who satisfy the eligibility criteria are welcome to join the groups.

## NextGen Groups

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NextGen Groups are designed for members in the first decade of their careers, and generally focus on establishing a peer network and providing skill-building programming. Participation in a NextGen Group is open to female members of 100WF in good standing.

NextGen Groups are offered in these locations: New York, London, Hong Kong, Toronto, Dublin, Cayman Islands, Northern California, Southern California and Singapore.

## MidCareer Bridge Group – Pilot Program

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In 2019, 100WF introduced a pilot MidCareer Bridge Group in London, a peer network designed for members with ten to 18 years of industry experience, including those who may have left the industry for period of time and are interested in returning. The aim of this Group is to help women explore the opportunities and challenges of the mid-segment of their careers via professional development, leadership coaching, networking and community building.

Participation in the MidCareer Bridge Group is open to eligible female members of 100WF in good standing.

## Peer Advisory Groups (PAGs)

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Peer Advisory Groups (PAG) are circles of senior practitioner members working in the same functional areas. PAG programming is created to meet the specialized needs of these more tenured members, and is geared to facilitate engagement with peers in order to leverage collective wisdom, skills and experience. A current list of available PAGs and their locations can be found [here](#).

PAGs are lead by senior volunteers who organize events and programming for the constituent members of the PAGs. Volunteer expectations of PAGs leaders are similar to those of traditional 100WF volunteers.

Members who wish to launch and run a *new* PAG should consult the CEO to determine the capacity and level of interest in a given location. Please note that there is a formal process to follow to initiate a new PAG.

## Locations

100WF has official [locations](#) in 24 cities around the world. We refer to locations in major global financial centers where we have large concentrations of members – New York, London and Hong Kong – “Premium” locations. These locations produce a large volume of programming and are served by several functional committees and a large network of volunteers. Our other locations are equally important to 100WF’s mission and reach members outside major financial centers. Their volunteer operations are typically scaled to the size of the local membership and event schedule.

100WF locations are not “chapters” which has distinct meaning in US non-profit corporation law. Accordingly, 100WF uses the term “location” to describe its global sites of official operation.

### Location Resources

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Each 100WF location operates under the purview of the 100WF global organization’s policies and guidelines.

Each location is supported by the 100WF staff and systems for event planning, venue sourcing, invitation and RSVP management and, in rare instances, for payment processing. Locations have access to 100WF’s design templates for visual projection and may be provided with signage and other helpful accessories. 100WF will also help to promote and acknowledge a location’s programming, speakers and sponsors via our global social media, if globally relevant and appropriate. Please see the Appendix for details.

Locations do not have a local budget assigned from local access fee payments. Each location and each committee is expected to fund its programming through in-kind or sponsorship support from industry firms who wish to support 100WF’s programming. Speakers are not compensated nor reimbursed for expenses through 100WF’s global budget. Committee members should use their networks or seek assistance from the staff to source speakers who participate on a pro bono basis.

In line with the expectations mentioned above, most committee volunteers expect to underwrite small personal expenses (such as travel or meals) related to 100WF. Occasional large out-of-pocket expenses incurred by committee members should always be discussed and approved in advance with the COO, who will determine whether or not such expenses will be reimbursed from the global budget.

Locations should not seek any government grants or financial corporate sponsorship without first contacting the COO, as this may affect the 501(c)3 nonprofit status of our 100 Women in Finance Foundation in the US.



## Legal, Regulatory and Banking

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If a specific location's leaders believe it may be required by local law to set up a legal entity or register as a legal entity in order to carry out education events for 100WF, they should immediately alert 100WF's COO. 100WF's Management will then consult with legal counsel to determine next steps. No location should take action on setting up a legal entity (nor advise sponsors that they are establishing a legal entity) without the express written permission of the CEO or COO. In the event that a local legal entity is required, 100WF Global Association will maintain a controlling position in any such local legal entity as to ensure proper accountability and governance.

Any local contracts should be signed by the CEO, COO or regional staff person of 100WF Global Association. Local committee members should not sign contracts on behalf of 100WF without explicit written permission from the CEO, the COO or one of the regional staff members.

Most 100WF locations do not need a local bank account in order to operate. Corporations will generally either host an education event in their facilities or directly pay for a venue and catering. From time to time, however, a location might host a *self-pay* dinner or other activity that requires member payments and the ability to efficiently settle a bill with a vendor. In these cases, the committee should contact their regional staff contact, who will work with the COO to set up both a payment link to 100WF Global Association (PayPal, for example) and also arrange to pay any bills directly from the 100WF Global Association account.

Unless explicitly agreed by the CEO or COO, 100WF does not offer cash receipts for payments. If committee members require reimbursement for local expenses, they should seek pre-approval from the COO to incur the expense and must submit all receipts in a timely fashion for reimbursement by the COO.

If payment *to a vendor* is required for an approved expense, an invoice written to 100WF must be presented to the COO, who will arrange prompt direct payment.

## New Locations

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The decision to launch a new location is undertaken after careful review and planning. The process begins with a conversation the CEO regarding the potential of the location to deliver volunteer-led programming, adequate membership growth and alignment with 100WF's policies and traditions. When 100WF believes that a new location can successfully operate, the CEO and regional staff person works with local member volunteers to prepare and plan for the location's integration into the 100WF organization. This is an intentionally structured process that can take some time.

The Approval Process for New Locations and New Location Guidelines and Recommendations are available by contacting [staff@100women.com](mailto:staff@100women.com).

## Revitalizing Locations

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It occasionally happens in a location's lifecycle that it experiences a season of less than optimal programming or volunteer engagement. It is important for this to be recognized and discussed among the volunteer leaders and with the 100WF staff. 100WF has special resources to help a location reinvigorate its volunteer base and to drive compelling programming. If a volunteer believes her location needs additional support to achieve her goals, she should reach out the regional staff person or the CEO for guidance and assistance.

## Ethics

### Conflict of Interests Policy

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100WF volunteers are expected to act solely in the interests of 100WF in the execution of their 100WF duties. 100WF volunteers (acting individually or as a group) may never receive personal payment, financial credit, or explicit favor from 100WF event hosts, sponsors or anyone else for their work in planning, organizing, coordinating or facilitating 100WF events. This policy applies even if the intended use of any such payment, financial credit or explicit favor might ultimately benefit 100WF's members.

This policy extends to volunteers making introductions to 100WF on behalf of conference organizers, media outlets, vendors/service providers of any type, or any other business enterprise. When 100WF volunteers make these referrals, they do so as volunteers. Any "gray areas" around interpretation of this policy must be raised and fully disclosed by the volunteer to 100WF management. Questions regarding interpretation of this policy, or reports of violation of this policy – either by a volunteer or by a sponsor – should be immediately directed to the COO.

### Gift Policy

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100WF volunteers may not receive any gift worth more than \$50 USD from an event host, sponsor, vendor or other service provider, offered in conjunction with her duties as a 100WF volunteer. 100WF may accept hospitality valued in excess of \$50 (such as meals, or invitations to attend events), provided that the gift-giver is present. Questions regarding interpretation of this policy, or reports of violation of this policy – either by a volunteer or by a sponsor, should be immediately directed to the COO.

100WF volunteers who wish to self-sponsor a gift to a speaker should apply this policy, and note that 100WF does not provide reimbursement for such gifts.

### Non-Discrimination Policy

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100WF is committed to equal membership and volunteer opportunity without regard to age, ancestry, disability, national or ethnic origin, race, religious belief, sex, sexual orientation, gender identity, marital status, political belief or military veteran status. Certain 100WF by-invitation groups, however, are designed for those who identify as female. Currently, these groups include NextGen Groups, MidCareer Bridge Groups and PAGs. Volunteer leaders of these groups must be members of these groups. 100WF volunteers are expected to comply with this policy. Questions about this policy should be directed to the COO.

## Membership

100WF's membership remains overwhelming one of self-sponsored industry practitioners. One of the expected responsibilities of serving as a volunteer is to advocate for paid membership, encouraging new members to join the organization and reminding long-term members to keep their Access fees current.

It is important for volunteers to understand 100WF's membership structure as it pertains to their location so that they can best manage RSVPs to their events and respond to member inquiries. Global Advisory Council members are a good resource for assistance in recruiting new members, and explaining the attributes and benefits of membership.

### Access Fees and Individual Membership Levels

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Registered members of 100WF must pay an annual Access fee in order to attend our educational or peer engagement events around the world and to make use of our on-line resources. Access fees are used to fund the organization's standard annual operating costs including staff salaries and consulting fees, organizational expenses and other professional services fees.

100WF offers different membership options:

<b>Standard Global</b>	<b>Premium Global</b>	<b>Premium Global - Angel</b>
<b>\$100/year</b>	<b>\$150/year or \$350/3 years</b>	<b>\$1,000/year or \$2,500/3 years</b>
Standard members are welcome to events in Premium locations (New York, London and Hong Kong) but will be waitlisted until after Premium Global members have been accommodated and if any capacity remains. This option is appropriate for members who do not wish to attend events in Premium locations.	Required for priority access to events in Premium locations (New York, London and Hong Kong). Members who wish to attend events in Premium locations are encouraged to select the Premium Global membership option.	Global Angels are Premium Global members who provide additional financial support to the organization. In appreciation, Global Angels receive special considerations, such as invitations to Angels-only events in select locations, and recognition on 100WF's web site and in 100WF Gala programs. See Global Angels program under "Other Sources of Funding."

All global access fees are paid to support 100 Women in Finance Association, Inc., a US-based nonprofit organization. Along with other corporate and individual donor support, this funding enables 100WF to operate as a fully integrated global organization – paying for staff, technology, compliance and other operational expenses.

In the US, Access fee payments may be deductible as ordinary and necessary business expenses to the extent permitted by the Internal Revenue Code, but not as charitable contributions. In Hong Kong, Access fee payments cannot be deducted as charitable contributions for Hong Kong salaries tax purposes but such payments may be deductible as business expenses to the extent permitted by the Inland Revenue Ordinance if members are carrying on business in Hong Kong.

Members of any 100WF location should always contact their local tax authorities and personal tax advisors regarding the deductibility of 100WF Access fees from personal income taxes.

### Corporate-Sponsored Memberships

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100 Women in Finance welcomes the purchase of memberships by corporations on behalf of their employees. Many companies see membership in 100WF as a valuable investment in their employees' industry education and professional networks, and are pleased to support their staff in this way.

If a company wishes to purchase 10 or more memberships, 100WF is able to issue an invoice for direct corporate payment, if desired. Requests of this nature should be sent to [membership@100women.org](mailto:membership@100women.org).

If a company wishes to purchase a large number of memberships – 100 or more – the company should contact [membership@100women.org](mailto:membership@100women.org) to discuss the most optimal economic and administrative arrangement.

## Other Sources of Funding and Support

### Global Angel Program

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Global Angels have, since the earliest days of 100WF's existence, provided essential support to toward the fulfillment of 100WF's mission. Initially, Angels provided foundational financing that enabled 100WF to professionalize its operations and build a sustainable infrastructure. Many of these founding Angels remain supporters to this day.

The generosity of 100WF's Angels has been steadfast over the years. Angels have traditionally been senior practitioners who make this donation to the organization, in part, to express their gratitude for 100WF's role in the success and enjoyment of their careers. Increasingly, Angels include younger members, members sponsored by corporate arrangements, and special invited guests who become Angels on their own accord.

All 100WF members are encouraged to become Global Angels. There is no professional qualification or membership tenure requirement to become a Global Angel.

### Leadership Council

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100WF's Leadership Council is a select group of firms that support 100WF's mission at the corporate level. Leadership Council members include international banks, alternative investment firms, asset management firms and industry service providers. Leadership Council members typically engage with 100WF an expression of their corporate commitment toward diversity and inclusion as related to women, who traditionally are underrepresented in investment professional and executive roles.

100WF's CEO manages all Leadership Council relationships, and inquiries about or from prospective Leadership Council members should be directed to the CEO for handling.

Typical key features of a 100WF Leadership Council arrangement:

- Amplification of the Leadership Council firm's public commitment to the advancement of women in the finance industry. This aids in the recruitment and retention of female professionals and is reinforced through mutual branding on a variety of communications platforms, including website, printed material, social media and other forms of public acknowledgement.
- Direct access to D&I thought leaders at peer LC member firms, whom 100WF assembles for regional forums on shared priorities.
- Direct access to 100WF's CEO for dialogue, assistance with high-profile C-suite and investment team recruiting, and keynote or panel speaking on financial industry D&I themes.
- Allocation of individual memberships for the LC firm's employees.

- Opportunity to host and/or to provide employee speakers at 100WF-produced events, and to extend special invitations to 100WF members to the LC member's proprietary programs.
- 100WF staff support to liaise on behalf LC firm's employees for engagement on 100WF committees, in by-invitation groups (NextGen, MidCareer Bridge and Peer Advisory Groups), and for public speaking opportunities (conference, media).
- The option of preferred seating and branding opportunities at one or more of 100WF's Gala fundraiser dinners around the world.
- Full access to all other 100WF member services and benefits, including: 100WF Job Board, 100WF Education and Peer Engagement events, 100WF investment conferences, 100WF Female Fund Manager directory, 100WF Corporate and Non-Profit Board initiatives, and by-invitation Groups (NextGen, MidCareer Bridge, PAG and Senior Practitioner).

Leadership Council firms are typically eager to host and support 100WF programming in 100WF locations where the firms have a presence. Volunteers should look for opportunities to engage Leadership Council members in their location for committee work, as event hosts and as speakers. The regional 100WF staff person is the volunteer's best resource for insights about how to approach and manage these opportunities with Leadership Council firms.

The current list of 100WF's Leadership Council firms can be found [here](#).

## Committee Roles and Responsibilities

Committee work is thought by many members to be the beating heart of 100WF. Working alongside other 100WF volunteers to produce education, peer engagement and philanthropic opportunities for other members and women in the industry can be deeply satisfying and can generate long-lasting friendships in the process. It does, however, require a commitment.

Locations, as already discussed, usually operate Education and NextGen Committees. If a location additionally adopts the Philanthropy pillar, it would likely also have a Gala Committee and a Beneficiary Due Diligence Committee. Some locations may simply have a “main” committee, which produces both education and networking events, at least until membership growth and volunteer power allow for broader programming and leadership specialization.

The 100WF Education Committee is the “classic” committee, and while similarities with other committees exist in form in function, *what follows is general guidance for Education Committees.*

General Expectations of Committee members:

- Attend all/most committee meetings in person or by conference call. The committee should agree on a schedule of meetings to enable forward planning (e.g. meetings to be held on the first Monday of each month or quarter from 5:30 – 6:30 PM). Each committee member is expected to contribute to discussions, including ideas relating to events, sponsors, speakers and topics, and to carry out any tasks assigned to her in a timely manner.
- Attend as many events as possible, and attend any events for which she has had primary responsibility. Accordingly, event dates should be set as far in advance as possible. Some committees find it helpful to set out a basic calendar of events for the following 6-12 months and allocate responsibility for each event to a committee member.
- Conceive and produce events with primarily focus on *finance industry* topics. Events focused on philanthropic topics, professional development, Diversity and Inclusion and pure networking should be limited. The regional staff person can assist committees with ideas for balanced programming, as needed/desired.
- Take responsibility for leading/organizing at least one event per year, and for serving as the #2/back up organizer for another event. The basic responsibilities for an event includes:
  - securing a sponsor
  - securing speaker(s)
  - managing the invitation and RSVP process via 100WF’s event management system (EMS)



- engagement with any local 100WF Global Advisory Council members to arrange their participation in the event
- serving as the MC or on-site coordinator for the event from start to finish
- When a committee member is not the primary organizer of an event, it is expected that she will still help assist with the event as required including by: a) actively volunteering for specific tasks during the planning stage, prior to the event, at the event and after the event; b) encouraging 100WF members to attend the event; c) encouraging potential 100WF members to attend the event as guests where there is capacity and then following up to encourage them to become 100WF members; d) assisting with securing sponsorship and speakers for events (keeping in mind the strength and depth of her contact network).

### Committee Composition

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Selection of committee members is the discretion of the committee co-chairs, with the following recommendations from successful locations:

- Committees should broadly represent the industry demographics of the location where events are being organized.
- Committee volunteers should reflect as many different roles in the industry as possible (for example, ensuring there is at least one investment professional on the committee).
- Firms represented on the committee should aim include at least one or two representatives from Leadership Council members, as well as a diversity of types of organizations (i.e. Private Equity, Hedge Fund, Real Estate, Institutional Investors, Asset Management, Investors, Accounting, Legal, FinTech, etc.).
- It is a healthy practice have both senior practitioners and more junior members serve on the committee, both for volunteer development and succession planning.
- Many committees assign functional responsibilities to their members, in which case seeking members with special skills can be beneficial. For example, a committee may assign the following responsibilities to committee members: membership growth, liaising with event hosts, event logistics, social media write ups, etc.

Committee members may be women or men who are 100WF members with current membership fees. NextGen Committee members must also be NextGen Group members.

Committee co-chairs should be transparent in their selection process and communicate pathways for interested, qualified members to join their committees. Co-chairs looking build their committees should contact their appropriate regional staff person or Event Coordinator for assistance.

## Committee Chair

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The committee chair's additional responsibilities include coordinating committee meetings and overseeing the schedule of events, conducting reviews (see below) and when appropriate appointing a vice chair. She should be available to attend any global or regional committee chair calls, as directed by staff. In addition, the committee chair should be mindful of succession planning to enable an orderly transition of both the chair's position and committee members' positions in due course.

## Committee Review

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Based on guidelines for committee roles and responsibilities, 100WF's regional staff contact (or in some cases the CEO or COO) reviews all committees annually with each committee chair to ensure that committees are functioning well and that all committee members are contributing appropriately. The committee chair should also routinely report to the regional staff contact regarding what is working well and where improvements can be made regarding event quality, committee operations and committee member contributions.

100WF recognizes that work and personal circumstances may shift, but to ensure a consistently compelling experience for members, committee members who have not met the criteria for active participation may be asked to step down.

Furthermore, it is strong practice for committees to conduct an annual self assessment. A sample of committee self assessment is found in EMS under "Volunteer Resources" or by contacting your Event Coordinator.

## Committee Service Duration

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There is no specific term that a committee member serves. Usually, the committee chair serves for a maximum of three years, with some flexibility in unusual circumstances. A new committee chair's goal over the first year of leadership is to find a suitable replacement for her role. In some cases, committee chairs formally appoint this person as a vice chair of the committee.

If a committee chair or committee member is unable to fulfill her committee responsibilities, she should contact the committee chair, or in the case of the committee chair, the regional staff contact, at the earliest opportunity.

Any committee member may suggest new committee members for the committee to consider. Prospective new committee members should meet with the committee chair initially to discuss their desired involvement. In the case of individuals working for Leadership Council (LC) firms, staff may require committees to find a committee role. If there are any issues integrating this LC representative onto the committee, the regional staff contact should be alerted and a potential alternative suggested by the LC firm.

We request all committee members to read this Volunteer Handbook, and sign 100WF's *Committee Member Agreement* on an annual basis. This is important to avoid misunderstandings that may occur when 100WF updates its policies and procedures.

## Committee Communications and Relationships

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Committee members are all volunteers with busy schedules and other commitments. All committee members should be mindful of this and aware that they should carry out their responsibilities in a complete and timely manner.

Committee group emails (committeename@100women.org) should be used to organize 100WF events and discuss ideas. Committee Chairs should periodically engage with their regional staff person to audit the constituents of committee email address for accuracy and completeness. Requests for adjustments to committee group emails should be made by completing the "Committee Update Template" which you can obtain from your Event Coordinator in your region. After completing the template, the 100WF website, EMS records and committee email will be updated.

If necessary, 100WF will create an email address for a volunteer in the format of *jane.smith.volunteer@100women.org* for committee members who wish to keep their 100WF activity separate from their business and personal email accounts.

Volunteer will have access to other members' personal email addresses and phone numbers. You may not share this information with external organizations or individuals. Volunteers with access to EMS will need to verify their understanding of and compliance with this requirement in order to use 100WF systems.

All communications between committee members (including emails and phone conversations) should always be respectful, relevant and efficient.

Difficulties with another volunteer should be addressed directly with the other person. If this isn't possible, the committee member should consult a 100WF staff member for help. If this doesn't work, the committee member should contact the CEO. If the difficulty relates to a staff member (other than the CEO), the committee member should approach the CEO. If the issue relates to the CEO, the committee member should contact the Chair of the Global Association Board.

## Resources and Tools

This is section of the Volunteer Handbook addresses resources and tools for volunteers.

### Specialized Support

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Please use the below email addresses for inquiries or suggestions on specific topics.

Corporate and Private Board Initiative	<a href="mailto:corporateboards@100women.org">corporateboards@100women.org</a>
Corporate Sales – Membership	<a href="mailto:membership@100women.org">membership@100women.org</a>
External Conference Speakers & Promotions	<a href="mailto:promotionpartner@100women.org">promotionpartner@100women.org</a>
Female Fund Manager Visibility	<a href="mailto:fundmanager@100women.org">fundmanager@100women.org</a>
Investing in the Next Generation Initiative	<a href="mailto:nextgeneration@100women.org">nextgeneration@100women.org</a>
FundWomen Investment Conferences	
San Francisco	<a href="mailto:conf-SF@100women.org">conf-SF@100women.org</a>
London	<a href="mailto:conf-London@100women.org">conf-London@100women.org</a>
New York	<a href="mailto:conf-NY@100women.org">conf-NY@100women.org</a>
APAC	<a href="mailto:conf-APAC@100women.org">conf-APAC@100women.org</a>
Job Board	<a href="mailto:jobboard@100women.org">jobboard@100women.org</a>
Leadership Council	<a href="mailto:ceo@100women.org">ceo@100women.org</a>
Membership and Member Profile	<a href="mailto:membership@100women.org">membership@100women.org</a>
Next Generation Groups	<a href="mailto:nextgeneration@100women.org">nextgeneration@100women.org</a>
Non-Profit Board Initiative	<a href="mailto:npbq@100women.org">npbq@100women.org</a>
Social Media	<a href="mailto:socialmedia@100women.org">socialmedia@100women.org</a>
Traditional Media (Press)	<a href="mailto:media@100women.org">media@100women.org</a>
Web Site	<a href="mailto:tech@100women.org">tech@100women.org</a>

Requests for a 100WF group email address should be sent to the COO with a rationale for the group address and all desired constituent members. 100WF staff are included on group email addresses.

## Event Management System (EMS)

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Depending on your volunteer role, you may be granted access to 100WF's Event Management System (EMS), 100WF's platform for managing our global event pipeline, developing and producing invitations and collecting RSVPs. Typically volunteers responsible for Education, NextGen, PAG and Philanthropy event execution are granted EMS access and are expected to use it consistently and responsibly for all 100WF events.

New volunteers will be trained to use EMS by a 100WF staff person (likely by your regional Event Coordinator), or a very experienced 100WF volunteer member, as part of the on-boarding process. Your committee chair(s) should advise your regional staff person or Event Coordinator when this training via conference call should occur. Once trained, your Event Coordinator will be your key contact for EMS support.

A separate EMS Manual addresses guidance for proper use of EMS. Contact your location's Event Coordinator for access to the EMS User Guide.

## Event Management - Guidance and Best Practices

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100WF has developed a number of tools to help volunteers produce events in ways that reflect our brand, our mission and standards of quality. Volunteers with EMS access will find many of these tools on our web site once they log into the 100WF web site (look for the blue button on the right hand side of the screen). Examples of available resources include:

- Event Execution Manual
- Sample Committee Member Roles and Responsibilities
- Committee Member On-Boarding Agreement
- Monthly Talking Points (Announcements) for Event Organizers

## Job Board

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100WF maintains a vibrant Job Board to assist companies in finding talent within our membership. Members are welcome to post job openings at their companies, or to monitor listings for personal interest. Anyone is welcome to post any position, following the guidelines provided on the board. Questions about the Job Board should be sent to [jobboard@100women.org](mailto:jobboard@100women.org).

## Community

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Community is 100WF's private, on-line platform for member-to-member communication. Community is accessible by all 100WF members with current access fees following web site log in. All members may post information about anything they desire, start a discussion, or connect

with other members. Volunteers are encouraged to use Community, as needed or desired, as a compliment to 100WF's official communications.

Some members use the platform to share notice of industry events or to promote external fundraisers in which they are involved. Groups within Community have been established for the members of NextGen Groups to facilitate networking and communication. Community is not moderated and users are expected to use good judgment and common courtesy when using the platform. Users who disrespect these guidelines will be restricted.

## Social Media

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100WF currently owns and manages official pages on several social media sites. Generally speaking, our dominant site for the vast majority of 100WF content is LinkedIn, though we also use Twitter for event announcements and breaking news. 100WF uses its social media feeds to post photos and write ups of 100WF events, and to supplement our communications about upcoming events and important milestones. As a volunteer you are encouraged to follow 100 Women in Finance on LinkedIn and Twitter.

To source content for 100WF's social media pages, 100WF relies on global volunteer reporters who provide event write ups and photographs, who write member profiles, and who pitch ideas for other social media stories. It is a good practice to obtain subjects' permission to post their photos. All contributions for 100WF's social media pages should be sent to [SocialMedia@100women.org](mailto:SocialMedia@100women.org).

Please note that there also exists a large 100WF LinkedIn Group for those who wish to informally connect and share content with one another. 100WF does not actively monitor or manage the 100WF LinkedIn Group. Group participants may or may not be 100WF members and this ad hoc community may not represent the views and priorities of 100WF.

100WF volunteers must not establish new 100WF pages for their location or committee. Members may promote 100WF events via their personal social media accounts by reposting official 100WF posts.

Volunteers are welcome and encouraged to mention their volunteer work for 100WF in their personal social media profiles. Suggested language includes "Member, 100 Women Education Committee, Sydney" or "Chair, 100 Women in Finance NextGen Group, Cayman Islands." Volunteers and members should not use 100WF's logo on their personal business cards or on their personal websites, unless they have received written permission from the Chief Marketing Officer. They should also not indicate that they are employed by 100WF.

Please request 100WF Social Media Policy and Guidelines from your Event Coordinator or regional staff person for more complete information.

## Traditional Media

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100WF events and programming often attract the interest of the press. While 100WF events are traditionally off the record and not for attribution, we aim to assist the press with their reporting on our organization, our members and enable access to the constituent members of our Female Fund Manager directory.

**All media inquiries must be directed to [media@100women.org](mailto:media@100women.org).** A staff member will immediately and appropriately respond. Volunteers should not speak with the press about 100WF. Unless an exception is made by the CEO, the CEO is the only approved spokesperson for the 100WF organization.

## Resolving Conflicts

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From time to time, and as might be expected with any large volunteer-driven organization, conflicts occasionally arise. At 100WF, we assume positive intent in the shared pursuit of the organization's mission. As a community of adults, we suggest the best course of action when experiencing conflict with another volunteer, member or staff person is to speak directly with the individual(s) to express your feelings and to attempt to resolve the problem one-on-one. If this is not possible, or if there are extenuating circumstances, you may involve your committee chair(s), your regional staff person, the COO or the CEO.

## Suggestions and Complaints

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100WF benefits from informed and thoughtful suggestions from our volunteers. Volunteer feedback is essential to optimal operations, and 100WF is an ever-strengthening organization when we share ideas (and constructive criticism) that better enable us to serve our mission. Depending on the nature of your suggestion, you may reach out to your committee chair(s), your regional staff person/Event Coordinator, or if appropriate, the COO or CEO. Feedback regarding the organization's mission should be sent to the chair of the Global Association Board.

## Additional Resources

This Volunteer Handbook was designed to provide a broad and high level overview of topics volunteers will encounter in their work with 100WF. Many volunteers' duties will require deeper or more specified knowledge. The following Volunteer Resources can be found upon log-in to the 100WF website and accessed via the volunteer's Membership Profile (green button on right hand side of the screen):

- EMS User Guide
- Event Execution Manual
- Monthly Talking Points for Event Organizers and Global Advisory Council members
- Committee Member Update Form
- Social Media Guidelines
- Sample Committee Member Roles and Responsibilities
- Peer Advisory Group (PAG) Guidelines
- Committee On-boarding Expectations
- Committee Member Guidelines
- Brand Guidelines

## Other Policy and Guidelines Documents

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The following additional policy documents are available for Volunteer reference. For details please, send inquiries to [staff@100women.org](mailto:staff@100women.org)

- External Partner Guidelines and Policies (eligibility and services for external organizations)
- Special Invitation Policy (for external organizations)
- Overview for Consideration of New Locations