

## **Initiatives Liaison Transition Notes**

### **Key Elements of the Job**

#### **I. Corraling the Initiative Leaders!**

Open House – Touch base with every Chair to encourage participation in the Open House in September. Make sure to get vital info such as the size of the table they will need – a whole or a half table – and check to make sure they've planned for the materials to bring – especially a tri-fold or poster, handouts, photos etc. Summarize and report this information to the Membership Chairs.

Website – Make sure they review the website at the beginning of the year to refresh their pages, adding new material and removing old. Encourage new photos!

Speaking at Monthly Meetings – Arrange a schedule for the year for Initiative Leaders to address the membership on their activities, successes, upcoming events etc. – ten-minute maximum. Send completed schedule to all Initiative Chairs and Program Co-Chairs. There should be no more than one presentation per month. All should know that while they are welcome to address the Board whenever they want, these presentations can take the place of presentations at Board meetings.

Newsletter – The current slate of Initiative Chairs are highly experienced and many write articles regularly for the newsletter. But some don't. Keep tabs on the newsletter and encourage all Chairs to write articles. There should be at least one article about an Initiative in the newsletter every month.

Annual Reports and Budgets – In the Spring, ask all Initiatives to submit an Annual Report and Budget (Request for Funds) for the following year. Work with Diane J. and Pat L. to manage the process. Maria is a wonderful resource.

#### **II. Ongoing Support**

Keep in touch with the Initiative Chairs and provide support as needed. They all work very hard, and it's important that they feel supported by the Board. If you can, try to attend one meeting of each Initiative. This isn't required but it's a wonderful way to see what they do, and it will keep *you* motivated!

#### **III. Administration**

Board Liaison - prepare and present reports to the Board. This needn't be done every month, but good to do this *most* months. After all, this is the mission-based work that

importantly defines our Branch – why we do what we do – so frequent reports are welcome!

Membership Activity – Stay in touch with Membership Chairs – see if there's anything about the Initiatives they need for recruitment. You can do this every couple of months.

Budget Preparation and Annual Reports – In the Spring, together with the Treasurer and President, organize a meeting to decide how to allocate the money that was raised at the Tea in April. This will require preparing packages that outline the Initiatives' budget requirements for the following year, i.e. summarizing requests for new funds and providing highlights of the year. My recommendation is that you confer with Diane J. and Pat L. in advance, and agree on a format for presenting this information.

Decisions will be made at a meeting with the President and Treasurer, the Donations (scholarships) Chair, the Tea Chairs (Linda Roberts and Lula Allen), and such others as might be decided at the time. This is your meeting to organize.

The Treasurer will present a recommendation for approval at the June Board meeting.

#### **IV. Opportunities for Future Development**

1. STEM – We are always looking for new/more STEM projects. One of the STEM programs we participate in is the Marist Liberty Partnership – an endeavor that we support in name, i.e. Marist needs community groups to sign on to partner with them in order to get the grant. We also participate in action. Kris Puzza is your contact here. Maria's been overseeing this for a long time, so do check in with her for direction. Our only other STEM activity is Math Buddies – Barbara Van Itallie.
2. Women's Leadership Project – Maria is working with a small group to develop a new Initiative that would provide support for leadership development and essential career-building skills, e.g. salary negotiation. Keep in touch with Maria on this, and support her all the way.
3. The Mothers Project is on the verge of expansion, and there are big things afoot, but alas, there are complications as well. Diane J. and Maria are your key contacts, and I can help too.
4. Math Buddies needs more people!

**Submitted by:**  
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