

***Agenda Item 4(d)(ii)
September 19/23 EOC Meeting***

CAFII Media Consultant – Job Description

CAFII has a media consultant to advise the Co-Executive Director acting as the Media Spokesperson for CAFII (Keith Martin) and to support the Association on media and communications issues. The retainer is for 10 hours a month at approximately \$225/hour. If in any given month the 10 hours is insufficient, the media consultant could so indicate and CAFII could approve additional time billed at the hourly rate for the media consultant.

The media consultant needs to have excellent media relations experience, with a focused knowledge of the financial services industry.

The amount of work varies depending on activities in any given month, but the media consultant produces a blog entry once every two months for the website, which can be produced during periods of greater slowness (the frequency is flexible); and tries to post two items a week on our LinkedIn page to keep it current, but again if there are other activities this can be delayed to periods where there is more time available.

A key duty of the media consultant is that they are on the CAFII website media page as the contact for media. This is to prevent direct contact with the Media Spokesperson. The CAFII Board is very sensitive to having a cautious media presence, and the media consultant would assess a request for a media interview and only move it forward if it is deemed a low risk. There have been many instances where a press release is picked up by the industry press, but in the past 7 years there have been roughly only half a dozen cases where Keith Martin has had an interview with media.

The media presence of CAFII is limited, but strategic and considered, and can be assessed through the news section of the CAFII website:

<https://www.cafii.com/category/news/>

Another duty of the media consultant is to issue a professional press release in relation to key initiatives or developments. These could include the release of independent research commissioned by CAFII, or the appointment of a new CAFII Board Chair or Vice Chair.

CAFII tries to produce at least one video to post on its website every year. CAFII comes up with the topic, and the media consultant produces the storyboard. This then needs to go through a process where key CAFII volunteers provide input, which is incorporated into the video storyboard. The video itself is produced by our website supplier, currently Operatic Agency.

CAFII has a Media Advocacy Committee which meets quarterly, mostly virtually but in-person at least once a year. The media consultant is expected to attend these meetings so they can be aware of the key media advocacy priorities of the Committee.

Annually, CAFII agrees on a statement of work with an external website supplier (currently Operatic Agency) that includes a set of deliverables to improve the website and continue to improve Search Engine Optimization results. The media consultant is engaged in the effort to determine the website priorities and is involved in the ongoing discussions with the agency delivering the results.

The media consultant would provide a written report, and potentially a verbal report (10 minutes), once a year to the EOC and the Board summarizing the past year's progress around media advocacy and website issues.

Other duties and responsibilities could also occur from time to time.