SIG LEADERS KICK OFF INDUCTION
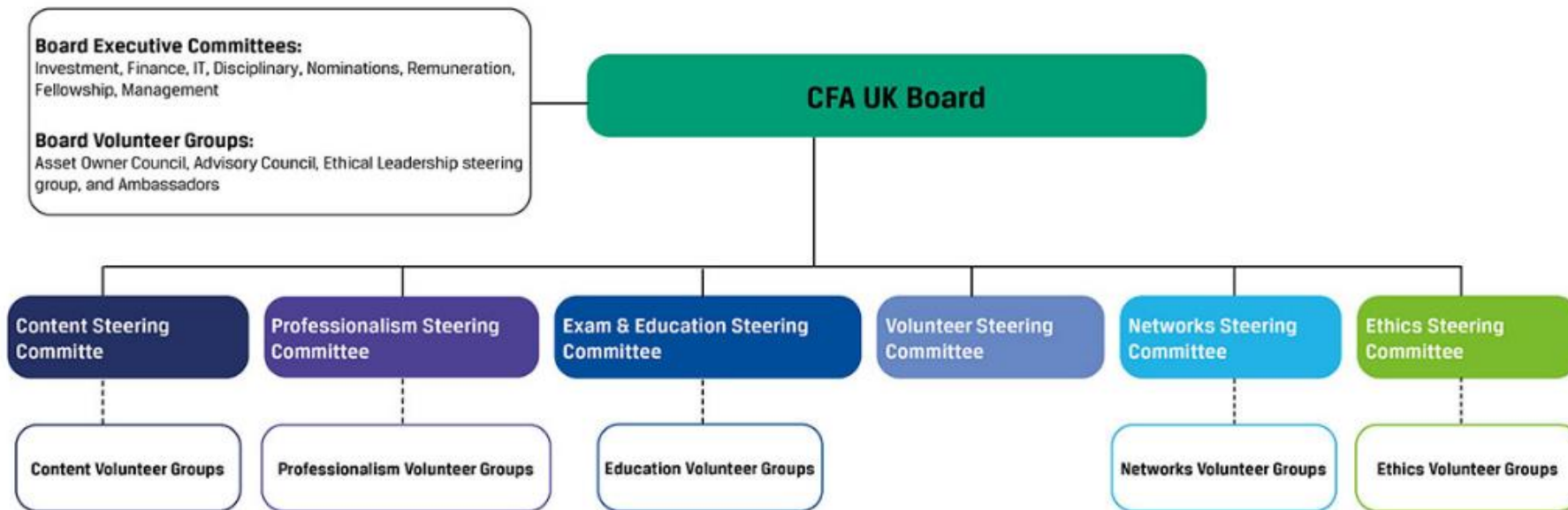
MARCH 2021

CFA Society
United Kingdom

PART OF SOMETHING BIG

Take a look at the whole volunteer programme

Board Executive Committees:
Investment, Finance, IT, Disciplinary, Nominations, Remuneration, Fellowship, Management

Board Volunteer Groups:
Asset Owner Council, Advisory Council, Ethical Leadership steering group, and Ambassadors

CFA UK Board

| Content Steering Committe | Professionalism Steering Committee | Exam & Education Steering Committee | Volunteer Steering Committee | Networks Steering Committee | Ethics Steering Committee |

Content Volunteer Groups | Professionalism Volunteer Groups | Education Volunteer Groups | | Networks Volunteer Groups | Ethics Volunteer Groups

THE SPIRIT OF VOLUNTEERING

- Shared common goal/purpose
  - Role description
  - Share views, thoughts, reach consensus

- Feel collaborative (through cooperation and coordination)
  - Everyone should participate
  - Facilitative vs directive

- Be inclusive
  - Understand individual strengths and limitations
  - Use emotional, diversity and cultural awareness
  - Be aware of your biases

- Feel meaningful and rewarding

FIVE GOALS FOR SUCCESS – SIG POLICY OVERVIEW

1. Engaged and motivated volunteers in each SIG leadership team

2. SIG theme fills a niche but remains relevant to the membership

3. Continual growth of SIG network membership with a majority CFA UK members

4. 2 formal webinars (fully supported) and as many virtual network events/pub meets

5. Regularly curated/created content that fosters discussion on SIG Network page

A vibrant and engaged community of link-minded professionals

WHO'S WHO IN THE STAFF OFFICE

Marissa Charles
Volunteer Development Manager

Marissa is available to support you throughout your volunteer journey to answer any questions or concerns

mcharles@cfauk.org

Nikhila Deshmukh
Member Services Assistant - volunteering

Nikhila is available to provide you with any info or admin related to understanding your volunteer role

ndeshmukh@cfauk.org

Adam Lipman
Content Marketing Manager

Adam can help with anything content marketing related from proof reading to advice on what members want to read.

alipman@cfauk.org

Nicki Morris
Events Manager

Nicki can help you develop your event ideas from the planning stage through to delivery

nmorris@cfauk.org

Fliss Smith
Events Executive

Fliss can help you with all event related

Anna Pinch
Head of Member Delivery
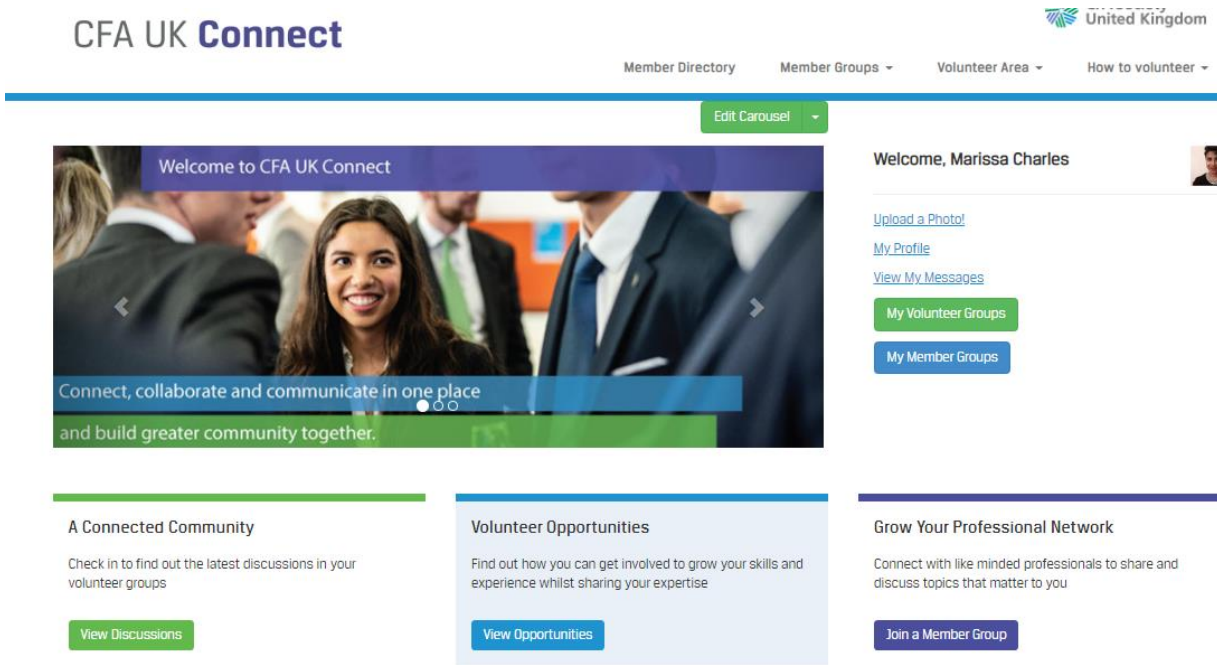
Anna can help with strategic oversight

Gerhard Sogl
Head of Professional Learning

Gerhard can provide expertise on

USING CFA UK CONNECT

- **Where to look**
- **Adding a discussion**
- **Tagging people**
- **Email and profile**
- **Setting notifications**
- **Events**
- **Library**

VOLUNTEER & SIG RESOURCES

- Volunteer FAQS,
- Volunteer Policy and Issues Resolution
- Social Media

- SIG Policy - a full overview of how to run a SIG

- How to host a virtual network

- Connect Admin functionality for your Network page

- Creating content for your page

SIG RESPONSIBILITIES

- Ultimate purpose is to grow and engage with your Network members

You do this by:

        Regularly posting content on your Network page

        Regularly engaging with Network members

        Delivering webinars and virtual network events throughout the year on your topic

REGULARLY POSTING CONTENT

- Your network page should be fresh and inviting

- Guide to seeding content
    - Tag people to comment
    - Ask questions about articles you have read

Post regularly so that new members have fresh information

Make sure that new content is seeded before Networks Campaigns

DON'T WORRY IF NO ONE RESPONDS….THEY ARE LOOKING!

REGULARLY ENGAGING WITH NETWORK MEMBERS

- Foster a sense of community by talking to your Network members

- Use the "Who's joined in the last 30 days" to send email messages to new joiners

- Use Connect functionality to Email all Community Members once a month with "news" and link to upcoming events or new content posted

- Message individuals who attend your events and connect with them

- @Tag Network members in your Discussion posts

DELIVERING EVENTS

There are FOUR types of event you can host:

1. **Webinar** – pre-scheduled, limited number, supported by Events Team
2. **Live Speaker event** – pre-scheduled, limited number, supported by Events Team
3. **Virtual Network event** – free to schedule, unlimited, autonomously run by SIG leadership team
4. **Pub Network event** – free to schedule, unlimited, run by SIG LT (or opt to replace Live Speaker event with a supported pub event)

Resources

- **Guide to digital engagement** – explains difference between types of content
- **Webinars vs Virtual Networks events** - explains difference between webinar and virtual networks to help you decide how to structure your event

- **Hosting a successful virtual network event** – gives you step by step instructions
- **How to use Zoom to host a virtual social**

- **Using Admin functionality to manage your SIG network and events** – gives you clear instructions on how to add events and invite your Network members.

WEBINARS

Wednesday webinar at one

- For topics/themes deemed relevant to the investment sector and to the professional interests of the wider CFA UK membership, we encourage you to deliver these as part of our Wednesday webinar at 1pm series

Other webinars

- In light of Covid-19, we have expanded our webinar offering to beyond the Wednesday webinar at one and ask you to be a part of this

- We encourage you to deliver other webinars with a niche topic/theme that will be of interest to those specifically within your SIG, but these are open to whole membership as well

- Other CFA UK webinars usually take place on Tuesdays or Thursdays at lunch time or late afternoon / early evening

Delivery timings

- Require a 6 week lead time (needs to be online and available to book on Eventbrite at least 4 weeks out)

- We have to ensure that the CFA UK Zoom license is not already in use and that CFA UK staff are available in order to support your event

10 STEPS TO ORGANISING YOUR WEBINAR

1. When have you been allocated slots for webinars?
2. Get in touch with the events team, Nicki and Fliss – events@cfauk.org to confirm
3. Do not secure a speaker without securing a date with the events team first
4. Allocate a host from your team
5. Refine your format (using slides?)
6. Provide events team with webinar details (title, abstract, bios)
7. Help to market your webinar through your network page and own networks
8. Put events team in touch with speakers
9. Help organize a test run of your webinar
10. Attend on the day and show your support

VIRTUAL NETWORK AND PUB NETWORK EVENTS

- Interactive online session with your SIG members only; small discussions, organised networking sessions, or regular socials for new members

- Or a informal pub meet

- Can be managed and delivered independently of CFA UK, using the meeting functionality within CFA UK's volunteer zoom licence or just finding a pub venue and inviting everyone.

Delivery Timings

- A 3-4 week lead time is required
- You will not require event support from CFA UK staff
- Secure a date with Events
- Zoom account will be booked for you if a virtual event

Promotion

- Set up and invite group members through CFA UK Connect by setting up an event on your SIG page
- If enough time, it can be promoted in What's On

OTHER THINGS TO CONSIDER

- We encourage you at all times to refer to the digital engagement guide, seeding content, CFA UK Connect functionality for SIG's and SIG policy paper

- All SIG webinars and virtual networks are free to members and non-members

- It's your responsibility to promote your events to your Network – whether a webinar or virtual network

Number of events per year

- Leaders should arrange a variety of three or more events per year targeted at their community.

- Hosting online events also alleviates previous pressures such as having to source a venue independently

- Live events are returning but we think virtual is here to stay to some degree

REWARD AND RECOGNITION

For the time you give to CFA UK, we want to make sure that you get something back. Rewarding you and recognising your efforts will come in many forms with your time with us.

- **Personal Development Training**
- **Volunteer Networking and Celebration Events** (hybrid between virtual and live events)
  - Volunteers week (June 2021)
  - Annual recognition event
  - Virtual networking events and opportunities throughout the year
- **Raising your profile**
  - Sharing your experience with a story or testimonial

VOLUNTEER FEEDBACK

- Annual volunteer survey – March
- Focus Groups – November
- 1-2-1 feedback with Volunteer Team – whenever you need
- Volunteer Steering Committee – contact through Connect or Volunteer Community
- End of year catch up – May/June
- Volunteer exit survey

ANY QUESTIONS