

# Volunteer recruitment policy

We're passionate about providing equal opportunities for volunteers. This means we operate a fair, open and transparent recruitment policy for all volunteer leadership appointments.

We encourage CFA UK members to apply for roles by reviewing their skills against available volunteer role descriptions and following the standard recruitment process outlined below.

## Section 1: Standard recruitment process

The majority of roles are recruited for via the following steps. For exceptions to this, please see section 2.

1. **Role description is written** – This is usually put together by members of the staffed office and/or volunteers. The role description should clearly explain the volunteer role, including the role title, its purpose, responsibilities, tasks involved, essential skills required, time commitment, duration, and the benefits for the volunteer.
2. **Role is advertised to CFA UK members** – We may use various channels of communication (newsletter, CFA UK Connect and social media) to ensure any advertised roles reach as many members as possible.
3. **Interested members apply** – all applicants will be asked to complete an application form and submit a CV.
4. **The staffed office arranges an initial phone call with each applicant** – This is to find out more about you and your motivations to volunteer.
5. **Volunteers are selected from the applicants** – The selection process is usually undertaken by senior volunteers with assistance from the staffed office. Successful volunteers are selected on the basis of:
  - The number of positions available
  - Their availability, willingness to commit and drive
  - How well they match the key criteria for the role
  - Their level of experience and expertise as applicable to the role
  - Their skills as a collaborative member of a group

The above criteria are particularly utilised where there are more applicants than positions available. Please note that most roles are open to members of CFA UK only. Some roles are open to non-members, where a skill or expertise is best sourced from outside of the membership.

6. **Applicants notified as to whether they are successful** – The staffed office will contact all applicants to let them know whether they have been successful. Unsuccessful applicants will receive feedback as to why they were not selected. Where possible, unselected applicants will be offered alternative roles to apply for.

7. **Volunteer Data** – if you are selected for a volunteer role, your application and CV will be kept until you finish volunteering with us. If you are not selected for the you have applied, your application and CV will be deleted immediately.

## **Section 2: Non-standard recruitment process**

The standard volunteer recruitment process may vary as some roles require volunteers to take on more responsibility at Board and Committee level. [Take a look at our Volunteer Programme structure](#) to fully understand how these committees work together.

### **Board members**

Each year in May, all society members are formally invited to nominate individuals or self nominate themselves for the CFA UK Board. The [Nominations Committee](#) considers all applications and will conduct extensive interviews with each nominee, after which they will make their final recommendations to the incumbent Board in September. The final recommendations are then put to the membership at the November AGM. The appointment of officers is formally decided by the Board immediately following the AGM.

### **Steering Committee Chairs**

All CFA UK members are eligible to apply for steering committee chair positions. However, understanding of volunteering at CFA UK as a past or current volunteer is a valuable requirement of all Committee leaders.

Shortlisted applicants are interviewed by the current Committee chair and a small panel made up from members of the Committee and CFA UK executive staff member. The recommended applicant's appointment is ratified by the society's Board.

Newly appointed chairs are encouraged to recruit and select their own vice-chair if not already in place. Volunteer leader vacancies are advertised via all our communication channels.

### **Executive committee members**

All CFA UK members are eligible to apply for executive committee volunteer roles and we encourage you to apply for the roles most suited to your skills and experience.

All vacancies are advertised as per the standard recruitment process.

All applications are passed to a small panel of the Committee for shortlisting and selected applicants will be invited for interview with the panel. The Committee has final decision for all appointments based on the needs of the Committee.

You can also attend a committee meeting as a guest so you can get a flavour of how it operates and meet the other committee members.

### **Steering committee members**

All CFA UK members are eligible to apply for steering committee member volunteer roles and we encourage you to apply for the roles most suited to your skills and experience.

All vacancies are advertised via all our communication channels.

If the Volunteer Development Manager feels your skills will suit the Committee, your application and CV will be passed to the Steering Committee Chair.

The Steering Committee chair and Staff appointed Committee representative will contact you for an informal chat. The Steering Committee chair has final decision for all appointments based on the needs of the Committee.

You can also attend a committee meeting as a guest so you can get a flavour of how it operates and meet the other committee members