



Working group member: Promoting volunteering as a Charity Trustee

No of new member volunteers	6
Timeframe	1 October 2018 to 30 June 2019
Commitment	40 hours
Reports to:	Will Goodhart, CEO

Purpose

Board level volunteering has enormous benefits for individuals, their employers and for the boards of the charities, public bodies and schools that they join, but often charities are unaware of the skill set that CFA UK members possess and it can be hard for individuals to know how to start getting involved. This working group will take the recommendations of the Value of the Investment Profession (VOIP) research and look at how CFA UK can promote the value CFA UK members bring with their skills and expertise and help facilitate more members gaining their first Trustee position.

The group should aim to deliver a programme across the 2018-2019 membership year to best promote Charity Trustee Board participation for CFA UK members

Main activities:

- Develop and implement the strategic direction and operational plans to support this initiative in line with VOIP recommendations.
- Assess the barriers to wider Charity Trusteeship amongst CFA UK members.
- Translate the variety of skills and expertise of CFA UK members into a language easily understood and recognised by charity board Trustees.
- Devise events and education for CFA members to facilitate their first Trustee position
- Explore and build partnerships with organisations involved in Trustee recruitment.

Who are we looking for?

- Members with experience of charity Trustee Boards as either a trustee or managing charity reserves.
- Those who are keen to become Trustee's and/or have attended events promoting Board participation
- We are keen to identify a volunteer lead to guide this group. If you are interested in leading, please state this on your application form.
- Volunteers with good communication and PR skills
- Availability for around six meetings throughout the membership year plus conference calls and work to move ideas forward between meetings
- Ability to work with a group to shape ideas.

What you will gain:

- Build your profile within the CFA UK network of volunteers, the wider membership and the industry
- Develop leadership, communication and team work skills



- Recognition for your contribution in shaping and delivering external charity volunteering services to the membership
- Opportunity to meet and network with other like-minded investment professionals
- Volunteering brings a “shared experience” amongst peers that has long lasting benefits for your career

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to volunteer@cfauk.org

Deadline for applications: 7th October 2018