



Valuation Index Working Group

No of new member volunteers	5
Timeframe	Ongoing, year round
Commitment	36 hours
Reports to:	Staffed Office

The Valuation Index (VI) was set up by the CFA UK in early 2000s to understand how its members view the asset valuations of the market. The VI is designed to reflect CFA UK's membership profile and represent views of the UK investment management industry. It is now one of CFA UK's most important brand assets as it frequently attracts media attention and coverage, which significantly raises CFA UK's brand value and proposition. The goal of this working group is to maintain the integrity of VI and ensure the index is well governed, trustworthy, and relevant to members.

Purpose and Activities

- Review the results each quarter and make comments on what should be highlighted
- Assess what questions would be of most interest to the membership
- Bring forward new ideas to generate higher response rates
- Generate new ideas to make better use of the historical data and results
- Perform annual review of the index policy and define risk appetite
- Work with the other working groups to further increase online coverage of VI
- Support the journalism and Brandes awards by performing as judges

Who are we looking for?

- Creative members who have a keen interest in indices
- Enjoy drafting comments and sharing VI related content online
- Available for around six calls throughout the membership year plus ad-hoc meetings
- Able to work with a group to shape ideas and build consensus
- Understanding of what would interest the membership and readers
- Interest in interacting passionately in an online environment (basecamp)

How the CFA UK will help:

CFA UK will provide an introduction into how it gathers surveys, produces press release, and engages with media to achieve coverage. It will also provide regular updates on how it is performing based on pre-defined KPIs and share results with this working group.

What will you gain from volunteering in this role?

- Opportunity to learn how an index is maintained and governed
- Gain medial marketing skills
- Have a forum for discussions and insight beyond your day job
- Opportunity to meet and network with other like-minded investment professionals
- Be recognised for your contributions and have the opportunity to attend a recognition event exclusive to the volunteer community

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: 30th June 2018