Institute and Faculty of Actuaries

Welcome to your Volunteer Information Pack

Volunteer: *At the Institute and Faculty of Actuaries (IFoA) the term 'volunteer' includes volunteers (members and non-members: lay), Office Holders, and Self Employed Contractors (paid roles). This pack has been designed for all of you, collectively known as our volunteers.*

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Welcome to your Volunteer Information Pack

This Volunteer Information Pack (VIP) is an online resource created as a 'one-stop shop' to assist and guide every individual who supports the Institute and Faculty of Actuaries (IFoA), be that as a volunteer (member or non-member), paid office holder, or in any other role.

You are one of more than 4,000 individuals around the globe who has committed to sharing your time and talent with the IFoA. Whether you are a valued member or one of the many other committed professionals who bring independent and complementary expertise, we are extremely grateful for everything you do to advance the global actuarial profession. As we navigate a rapidly changing world and help to address some of society's biggest challenges, our volunteer community is at the heart of ensuring the actuarial profession is sustainable, influential and sought-after, both as a career and as a source of insight, today and into the future; so once again, our sincere appreciation to you all.

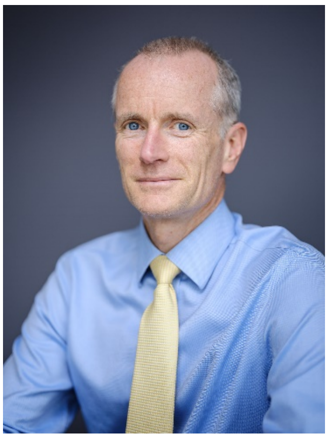
One of the most important elements of the volunteer dynamic is the partnership between volunteers and the IFoA's Executive team, as you work in tandem to drive forward the profession. During your time as an IFoA volunteer, you will have regular engagement with at least one member of IFoA and, through this relationship, receive the support you need to carry out your role effectively.

For our members, everything you do is guided by the Actuaries' Code. For all our volunteers, you embody the notion that IFoA membership – or service – is relevant at all stages of career and life. As you review the contents of this VIP, we trust you will find rich information (and answers to many of your questions) about the IFoA's current priorities and future direction.

The VIP is a constantly evolving resource, so please take every opportunity to provide us with your feedback. If you find certain content particularly useful – or identify something that is not included, but would be helpful to have during the course of your term – please let us know. We are always keen to hear what you enjoy most about your volunteer experience and how we can continue to strengthen it.

Please contact our Engagement team (e: engagement.team@actuaries.org.uk) to share your thoughts.

With grateful thanks from everyone at the IFoA.



As a member of Council and now as IFoA President, I have first-hand experienced of how rewarding it can be to volunteer for the profession. I have also seen how critically important it is to the IFoA's success that we continue to maintain a strong volunteering network. Thank you for your continued support!

Matt Saker
President

It is a privilege to serve as the IFoA's CEO. I have always had a deep respect for the actuarial profession, and am glad to support the important work of ensuring we have a modern and reflective professional body to support our volunteers and members.

Stephen Mann
Chief Executive Officer

2 What you need to know

Firstly, thank you…. We are extremely grateful to you for giving your time and expertise to support the Institute and Faculty of Actuaries (IFoA). You will be allocated at least one member of the IFoA staff to work with you. This person will guide and support you.

In delivering your role, best practice has been written up in our Governance Manual and in this Volunteer Information Pack (VIP). In taking on your appointment you agree to comply with the principles, policies and requirements set out in the Governance Manual and VIP, including our:

- Respecting Confidentiality statement
- Policy relating to Disciplinary Proceedings and Criminal Convictions
- Volunteer Expenses policy

If you have any questions, please speak to your IFoA staff contact, your Chair, or email our Engagement Team

2.1 For members of the IFoA

As you access sections of this VIP, we trust you will find rich information about the IFoA's governance, guidance, current priorities and future direction, as well as helpful tips and answers to many of your questions. For our members, this VIP should be read as being consistent with your regulatory obligations in the **Actuaries' Code;** the ethical code of conduct for all members of the IFoA.

2.2 For non-member (lay) volunteers and those undertaking paid roles

The VIP, and all associated IFoA governance and best practice documents, are primarily written to support volunteers who are members of the IFoA. However, the IFoA use the terminology 'volunteer' to refer broadly to a wide range of individuals who give time to the IFoA. As such, the support, recognition, guidance, policies and requirements detailed in this VIP are also applicable to all lay volunteers; paid office holders; and self-employed contractors (collectively referred to as 'volunteers') appointed by the IFoA to fulfil a particular role.

For us the term **'lay'** means someone who is not a member of the IFoA. This can refer to other actuaries (who are not members of the IFoA) and also to the many other committed professionals who bring their independent and complementary expertise to the role. In addition to any specific contractual arrangements issued at the time of your appointment, and of course any professional obligations applicable to your own profession, we also ask you to abide by the principles of our governance and best practice as set out in this VIP. All relevant sections of the VIP will be highlighted to you, by the member of the IFoA staff who is supporting you.

2.3 How best to use the Volunteer Information Pack (VIP)

We hope you will find the VIP a helpful information resource, especially for members volunteering for the first time.

It provides you with access to all the information you need to effectively undertake your role. It is not designed to be read from cover to cover. Please dip in and out of all relevant sections.

2.4 The IFoA values are:

- **Member-focused**: We put members at the heart of everything we do
- **Action-oriented**: We work hard, we work smart, and we take pride in getting things done, valuing action over perfection
- **Forward- and outward-looking**: We're always looking to be bold and improve, innovate and take the next step
- **Team-driven**: We work in partnership, advancing together as one IFoA.

3 Useful information

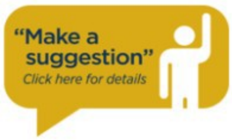
Part of the IFoA's strategy is to *"provide members with appropriate opportunities for volunteering"*. Since 2012, all new volunteer opportunities, which are open to all members, are advertised on the **volunteer vacancies** section of our website. This is in accordance with section 1.59 of the Governance Manual.

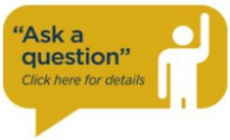
We aim to enable members to match their skills and experience with the task in hand.

Where possible, each volunteer vacancy provides details of what is involved, any timescales, a guide to the type of time commitment which might be involved, and a note of whether this volunteer role/task can be carried out from any location or at a specific venue.

In this section, we have highlighted in one place examples of some of the documents which are used to help members identify the best volunteer role/task for them and to help boards, committees and working parties gain support from members with the key skills, experience and attributes which they are seeking.

If you would like to find out more about any of the following, please speak to your Chair or key IFoA staff contact, or use the icons below to **'ask a question' or 'make a suggestion'.**





3.1 Role/task descriptions

We have created task/role descriptions, plus person specifications. These task and person specifications appear on a volunteer vacancy advert to help interested members see what is involved.

Here are two examples:

- View a Task and Person Specification for members of the Risk Management Research and Thought Leadership Sub-committee
- View the Task and Person Specification for an actuarial member of the Regulation Board

3.2 Terms of reference

All boards and committees have Terms of Reference which are approved in accordance with the governance structure. You can view the Terms of Reference for all IFoA boards in the **Governance Manual.**

If you are a member of an IFoA committee and would like to see the Terms of Reference for your committee, please speak to your Chair or key IFoA staff contact, or **‘ask a question’ or ‘make a suggestion’ using this link.**

3.3 Structure

View information on the Governance Structure of the IFoA

The IFoA staff sit within six Groups, which are:

- Chief Executive’s Office
- Engagement and Learning Group
- General Counsel Group
- Markets Development Group
- Operations Group
- Public Affairs and Research Group

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3.4 Key contacts within the Executive team

If you are unsure whom to contact, please ‘ask a question’ or ‘make a suggestion’ using this link and we will field your query to the appropriate member of the Executive team.

Stephen Mann
Chief Executive Officer

Stephen.Mann@actuaries.org.uk

“We work in partnership with our volunteers on our key decision-making bodies, including Council and Management Board, to set the strategic direction of the IFoA and ensure effective, transparent governance.”

Clifford Friend

Director of Engagement and Learning
Engagement and Learning Group

Clifford.Friend@actuaries.org.uk

“Our volunteers enable us to deliver globally leading actuarial education, qualifications and lifelong learning. We also work with volunteers and stakeholders across the globe to grow and develop our profession.”

Ben Kemp

Director General Counsel
General Counsel Group

Ben.Kemp@actuaries.org.uk

“We work with the IFoA Boards, leadership and volunteers to regulate our members in such a way as to assure public trust and to support business and innovation.”

Sarah Sim
Director Markets Development
Markets Development Group

Sarah.Sim@actuaries.org.uk

"We work with volunteers to develop and deliver the IFoA's global growth strategy through strategic management of relationships and markets."

Anne Moore

Chief Operating Officer
Operations Group

Anne.Moore@actuaries.org.uk

"We work together to ensure everything at the IFoA operates efficiently. The teams within our Group work with IFoA volunteers to deliver IFoA

Annette Spencer

Director Public Affairs and Research
Public Affairs and Research Group

Annette.Spencer@actuaries.org.uk

"We work in partnership with IFoA volunteers to produce research and analysis on topical issues of importance to the actuarial community and the public interest, and use this to let the world know about the work of actuaries through communications, marketing and digital campaigns."

The following may also be helpful:

Communities Engagement	Name	Email Address
Head of Communities Engagement Team	Joanne Davis	joanne.davis@actuaries.org.uk
Finance and Investment	Dawn McIntosh	Professional.communities@actuaries.org.uk
General Insurance		
Health and Care		
Life		
Pensions		
Sustainability		
Risk Management		
Regional Communities	Terri Myers	Regional.Engagement@actuaries.org.uk
Volunteer Recruitment and Engagement	Terri Myers	Engagement.team@actuaries.org.uk

Other Areas	Name	Email Address
Consultations		policy@actuaries.org.uk
Corporate Secretary	James Harrigan	james.harrigan@actuaries.org.uk
CPD Compliance	Patricia McLauchlin	patricia.mclauchlin@actuaries.org.uk
Disciplinary		disciplinary.enquiries@actuaries.org.uk
Education and Exams	Karen Brocklesby	karen.brocklesby@actuaries.org.uk
Events Team	Amanda Davey	amanda.davey@actuaries.org.uk
Library Services		libraries@actuaries.org.uk
Lifelong Learning	Patrina Effer	patrina.effer@actuaries.org.uk
International Associations		public.affairs@actuaries.org.uk
Marketing, Communications and Digital		CommunicationandDigitalTeam@actuaries.org.uk
Markets Development		markets.development@actuaries.org.uk
Media Relations	Sonia Sequeira	sonia.sequeira@actuaries.org.uk
Policy		policy@actuaries.org.uk

Other Areas	Name	Email Address
Professionalism	Fiona Goddard	fiona.goddard@actuaries.org.uk
Public Affairs		public.affairs@actuaries.org.uk
Quality Assurance Scheme	Emma Gilpin	emma.gilpin@actuaries.org.uk
Regulation		
Research and Knowledge	David Thomson	research@actuaries.org.uk

3.5 Involving your employer

Many employers actively encourage our members to volunteer for the IFoA. Noted below are comments extracted from two of our **volunteer experiences** which reflect that position.

- "My employer recognises the benefits that active involvement in the profession brings ... and encourages me and my colleagues to get involved."

- "My employers past and present have clearly seen the benefits to them of having their staff volunteer, as it brings increased exposure, a higher profile and fresh ideas."

View some of the **benefits** which employers have said they have gained through encouraging their people to volunteer for the IFoA.

Read an IFoA blog: The Value of Volunteering – "Many employers support members in taking on IFoA volunteer roles – with their own interests in mind."

In addition, as a volunteer, if you would like the IFoA to deliver a talk to highlight the benefits of volunteering and encourage colleagues to get involved, please let us know. We could deliver the talk in your office by video conference, or at your own company's annual CPD conference. Please contact the Engagement Team to discuss arrangements. The following describes a talk which we have delivered and we would be delighted to do so for you. This can be for students and qualified members or tailored to one group:

3.6 Involving student members

It is recognised that student time is mainly focused on passing exams, however, many student members are involved in volunteering for the IFoA.

The kinds of roles/tasks these members undertake for the IFoA include:

- becoming a member of the Student Consultative Forums
- becoming Career Ambassadors
- taking on an 'early career' role
- some student members are also members of working parties.

3.6.1 Tips for those wishing to join a working party (applicable to students and qualified actuaries)

If you specialise in a particular area and feel you could add value to a working party be sure to highlight this experience when expressing an interest and responding to the volunteer vacancy.

Demonstrate your enthusiasm for being involved and demonstrate your knowledge of the subject.

For some volunteer roles/tasks, we do require a volunteer with specific knowledge and experience which has been gained over a number of years working in a particular role. However, a student may be able to volunteer to undertake support work for that member and in return may gain valuable experience in doing so.

Think about how you could offer support to the more experienced members of the working party and make that suggestion in your email. For example, all working parties require to keep an attendance record of their meetings and a minute of action points/decisions taken. You could offer to perform this task or you may wish to offer to do a literature review, if that is appropriate, which may be helpful to the group. Also be sure to give examples of relevant research which you have already carried out, or been involved in.

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4 Working in partnership - volunteers and IFoA staff

For established boards/committees/working parties etc. there are established methods of working and support which will be explained to newly appointed volunteers as they join a particular group.

However, in line with our values and behaviours, please feel free to suggest new ways of looking at things. Fresh ideas are always welcome. Your ideas and suggestions will always be appreciated and considered.

4.1 Working together: who does what?

Each volunteer committee or group is supported, to a greater or lesser degree, by at least one member of the IFoA staff; this person is your group's key contact.

When a volunteer is appointed, they will receive key information from this member of staff. This will include a note of any key dates, materials, and an outline of who does what and how the group interact together.

If, as yet, you have not received this induction and you would find it helpful, please contact your Chair or key IFoA staff contact to request this information. Alternatively, if you prefer, or are unsure who to contact, please feel free to **'ask a question' or 'make a suggestion'** using the icons below.

4.1.1 The partnership between volunteers and staff

As a membership organisation, the IFoA is run in partnership between its members, who volunteer, and the permanent IFoA staff. The synergy created by our dedicated volunteers and staff working together in a professional partnership is powerful.

The backgrounds and operational styles of volunteers and staff are wide ranging and this diversity and multi-disciplinary approach is a strength. The vision is:

> *An effective partnership between volunteers and staff based on mutual respect.*
>
> *The members of the partnership all make a valuable contribution, reflecting their different roles and responsibilities."*

4.1.2 Appointment of volunteers

Appointments are made on merit and confirmation of the appointment will be made by a member of the IFoA's staff. The Engagement team are also happy to assist.

Appointments are usually for a set period of time. Some appointments are for short term, project-based tasks. Recommendations about length of tenure can be found in the Governance Manual in section 1.59.

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5 Protecting you and the IFoA

This section includes information to help volunteers when they are undertaking public affairs activity on behalf of the IFoA.

5.1 Representing the IFoA - speaking out and how we can support you

As part of our efforts to support our volunteers, we have identified some important things for volunteers to observe in order to protect your own reputation and the reputation of the IFoA.

If you have any questions, or wish to get involved in any of our public affairs activity, please contact the Policy Team.

5.1.1 The IFoA's public policy priorities

The Policy team, in consultation with the practice boards, has developed the following three key policy priorities:

These policy themes:

- represent significant economic and social challenges for policy makers at the domestic and international level
- are long term issues that transcend the duration of a Parliamentary term
- are areas where there are different perspectives on how the policy dilemma might be resolved i.e. the policy solution has not been identified.

As a membership body we focused on those policy challenges that:

- are of cross practice interest
- most importantly, are issues on which actuarial expertise can add significant value, and where opportunities exist for the actuarial professional to provide an evidence-based contribution to the policy making process.

The Policy and Public Affairs team seek to inform policy debate in the public interest by drawing on the range of expertise of our members, to tackle some of the biggest public policy issues facing society.

5.1.2 Getting our message out there

The Public Affairs team are here to support volunteers in promoting the IFoA's message. They can support engagement with external stakeholders by:

- identifying the right people
- setting up meetings
- providing briefing packs and guidance notes in preparation of meetings
- providing media and presentation skills training
- producing communications for external stakeholders.

It is important for the IFoA to be able to co-ordinate all our external engagement. Please help us by considering the following if you are representing the IFoA:

When opportunities arise to represent the IFoA at an external event or meeting, the Public Affairs team will make contact with relevant members/member groups to ask for volunteers. The Public Affairs team will support members when representing the IFoA externally by providing, as appropriate, a briefing note providing background information and agreed IFoA positions, media training and one-to-one guidance.

If the opportunity comes to you directly, through your own network of contacts, please consider in what capacity you are responding. Any volunteer is free to speak publicly or engage with any stakeholder where it is on behalf of their employer or in a personal capacity. However, if you are proposing to speak in the name of the IFoA, you must notify the Public Affairs team and adopt the IFoA line. If you are engaging as a technical expert, where prior positions may not be fully worked up, you should agree the approach, speak in the public interest and know the IFoA policy position for the relevant area. The Public Affairs team will be able to provide assistance in preparation for the meeting and it allows us to ensure we have a co-ordinated approach and consistent message.

From time to time we require experienced members to volunteer to take on public affairs/media roles for us. These opportunities are advertised on the **volunteer vacancies** section of the website. Sign up for the RSS feed on the volunteer vacancies webpage or contact the **Engagement Team** and ask to be added to the IFoA's 'bank of names'. This will ensure you are kept informed when new opportunities arise.

5.1.3 Why we need you to keep us informed

If any member (or member of staff) intends to speak to the media, regulators or government bodies etc., as a representative of the IFoA, they must alert the Public Affairs team for the following reasons:

With over 32,000 members and over 4,000 volunteers it is impossible for volunteers to remain up to date with the breadth of work and engagement that is undertaken by others. To protect and enhance the reputation of the IFoA and the profession, it is important that the IFoA always adopts coherent and consistent positions to the outside world.

This also applies when a committee or group intends to make a form of external communication, including responding to a consultation or issuing any kind of press statements and/or publication. The Public Affairs team is there to ensure co-ordination and coherence in all such activity by arming volunteers with the holistic view from the IFoA.

By alerting the Public Affairs team we will be able to ensure there is a single co-ordinated IFoA voice.

If you are planning to do any of the above please notify Policy@actuaries.org.uk in advance**.**

5.1.4 Registration of activities involving Scottish Policymakers

The Lobbying (Scotland) 2016 Act, passed by the Scottish Parliament in April 2016, aims to increase the level of transparency in relation to face-to-face contact made between organisations and the Scottish Parliament. This is called ‘regulated lobbying’, and the Act establishes a Register of Lobbyists. The IFoA is required by law to register all representatives who undertake ‘regulated lobbying’ on behalf of the organisation, and you should familiarise yourself fully with what constitutes registerable activity, and how to register such activity internally with the IFoA’s Public Affairs Team.

Please note that this register applies only to activity that takes place with Members of the Scottish Parliament (MSPs) and their staff in Scotland. Although there is a Westminster-based lobbying register, the IFoA is exempt from having to register any activity with this. Also, be aware of the distinction between representing the IFoA, another organisation, or your own views, as your registration requirements will differ for each.

In simple terms, the Lobbying (Scotland) Act 2016 requires organisations such as businesses, charities, trade bodies and professional associations to record, on a publicly viewable register, details of any face-to-face meetings held with:

- MSPs
- Scottish Government Ministers
- Special Advisers
- The Scottish Government’s Permanent Secretary.

When representing the IFoA to Scottish Policymakers, to assess whether your activity should be registered, the Scottish Government has outlined the ‘Five Tests’ which may be applied to a situation to determine whether it meets the definition of ‘regulated lobbying’. These can be found on the **Scottish Government website**.

If you have carried out ‘regulated lobbying’, then you need to alert the **Public Affairs team** via email, as soon as possible. The email should contain: your name and role, the names and roles of the people you met with, whether it was face-to-face or a video call, the time and date of your contact, the location, a description of what was discussed at the meeting, and the names and roles of any other IFoA representatives.

Failure to register, or providing inaccurate information on regulated lobbying activity to the Scottish Government, is a criminal offence, which carries serious penalties for those involved. These include parliamentary censure, fines and custodial sentences. All queries on the IFoA’s registration process should be directed towards the **Public Affairs team**.

5.1.5 The value of media engagement for the IFoA

The media is just one of many communication channels that the IFoA utilises to help disseminate information effectively and to raise the profile of actuarial expertise. Public visibility in the media raises awareness of new research, of your expertise and of relevant issues, with policy-makers and employers as well as the broader actuarial community.

To utilise the media effectively you must package the information that you wish to broadcast in such a way that it is attractive to journalists and be aware that they can add their own interpretation.

The team can draft strategies for audience engagement to ensure the target audience is reached, with the right message, thereby maximising the impact of your work and ensuring that the IFoA's reputation is protected. We do this by:

- drafting and issuing media releases
- contacting journalists
- arranging and attending briefing meetings with you
- providing media training and fielding questions.

In addition, we review media coverage of our key policy priorities as this can offer insight into perceptions and help to inform new research ideas, engagement approaches, and comment.

5.1.6 Joining an external committee

Many members sit on external committees and speak at events on behalf of their own organisations and in their own name, however, sometimes members who take on these roles can be viewed by the external body as representing the IFoA and our collective views. It is really important for members to ask the question as to which 'hat' they are being asked to wear.

If you are being asked to share the IFoA's views please contact the Public Affairs team. As above, this will allow the Public Affairs team to provide you with support and to co-ordinate opportunities.

5.1.7 Social media guidelines

The IFoA encourages volunteers to set up and help build communities online, with the help of social media. This can help volunteers deliver their role for the IFoA and also encourage others to get involved themselves.

If you are a social media user, we'd encourage you to share your experiences of IFoA volunteering with your social network. But there are considerations to bear in mind.

- as an IFoA volunteer, you need to be mindful that your own words and actions will reflect on both the organisation and the profession. When posting material, stating your views or opinions, please be polite, respectful, relevant, accurate where stating facts and civil to others and the IFoA, even if your views differ
- please make sure that your personal social media outputs are clearly your own and do not appear to be official productions of the IFoA. You can work with the executive to get outputs supporting your project published through our official channels

- as an IFoA volunteer, you will be privy to information that should be treated as confidential and you need to be seen to be exercising your judgement in this as a regulated professional. Remember that you a still bound by the Actuaries' Code in relation to you conduct
- show consideration to your fellow volunteers; it's usually best to agree with your colleagues what will be shared around your IFoA projects. And it's also good practice to get their support online, sharing and liking your posts.

You should familiarise yourself with our **social media terms and conditions of engagement**

5.2 Information on our policies

5.2.1 General policies

All volunteers are required to abide by and observe the IFoA's policies and procedures.

Our HR team review the IFoA policies on a regular basis and, whilst the majority of policies are primarily for staff, volunteers are expected to adhere to and be protected by our general policies as noted below. If you would like to have sight of any specific policy please contact the **Engagement Team.**

- Diversity and Inclusion Policy
- Dignity at Work Policy
- Health, Safety and Welfare Policy
- Information Management Policy (GDPR)
- Whistleblowing Policy
- Putting Things Right Policy
- Anti-Bribery and Corruption Policy
- Anti-Fraud Policy.

Although volunteer office holders are not legally protected by discrimination law; the IFoA will nonetheless treat those individuals fairly and in a non-discriminatory manner.

5.2.2 Insurance policy

It may give members comfort to know that we have in place Professional Indemnity cover, Directors and Officers cover, and Travel Insurance cover. Volunteers will be covered by these policies when acting for and on the IFoA's behalf e.g. on a working party, speaking at a sessional meeting, travelling on IFoA business etc.

Please note that any member who is travelling overseas, as a representative of the IFoA, must first complete a risk assessment before insurance cover can be confirmed. Your key IFoA staff contact will be able to help you with this, or speak to the **Engagement Team.**

However, please also note that insurance cover may not apply if volunteers are acting outside their authority or if a risk assessment has not been completed.

5.3 Legal considerations

5.3.1 Competition law

For all individuals engaged in activities for or on behalf of the IFoA, including volunteers (members and lay) and office holders (collectively referred to as ‘volunteers’) and especially those involved in member led research, it is vital that you are aware of the importance and issues involved in complying with Competition Law.

Volunteers are required to read and observe the following guidance:

View the IFoA Volunteer Information Pack Competition Law Guidance for volunteer groups. This includes a decision tree.

Simon Stokes, *Partner in Blake Morgan*, *London,* has created this competition law decision tree and guidance note as part of a one hour Professional Skills Training webinar which he presented with *Sarah Mathieson*, IFoA’s former Head of Research and Knowledge, and *Jill Chipchase*, IFoA’s former Head of Professional Communities, to support you in your activities with the IFoA. The webinar: ***What you need to know about competition law as a volunteer***. This was broadcast on 17 October 2018, and we recorded it. The video is now available to view via the IFoA **website**. If you experience any problems accessing the video, then please contact **VLE.admin@actuaries.org.uk**

5.3.2 Respecting confidentiality

By the very nature of your role, whether you are an individual who supports the IFoA as a volunteer (member or non-member), or in any other role, you will have access to information and material which is confidential.

Your respect for the confidential nature of this information and material, and the fact that it has been shared with you, is important to protect the integrity of the IFoA.

We ask that you keep this in the forefront of your mind when carrying out your role/task, ensuring that all confidential material and information is treated with the utmost care. Those who are members will be aware of their obligations of confidentiality under the Actuaries’ Code.

Click on the icon to view the code.

The Actuaries' Code

Some members may also be doing work which is covered by non-disclosure agreements, and in such a case your key IFoA staff contact will be able to provide you with the necessary documentation.

5.3.3 Intellectual property issues

One of the most important public interest functions of the IFoA is as a learned society, committed to open source material. This means that it is necessary that, once a paper has been presented or other form of publication made by an IFoA working party or group, the IFoA has free and unrestricted rights to publish it. Normally this will be achieved by making it freely available via the website. This means that authors can be confident that their work will remain in the public domain.

All volunteers should be aware that when they get involved in an IFoA working party or group, any intellectual property (IP) rights in relation to the work of that group are owned by the IFoA. This includes any materials, presentations and outputs (for example, sessional meeting papers) which are produced or developed as a result of the volunteer task/role being undertaken for the IFoA by this group. If a volunteer wishes to use any such material, presentations and/or outputs, please contact your IFoA staff representative who will discuss with you the measures which may require to be put in place.

For the avoidance of doubt, if you volunteer to present at an IFoA conference or event and the material presented by you is created independently by you, not in your capacity as an IFoA volunteer, the intellectual property in this presentation material shall not be owned by the IFoA.

Using existing data and obtaining necessary permissions

We recognise the support many organisations or third parties give in terms of allowing our members to use data and presentations which have been produced by that organisation/third party. Sometimes members bring this to an IFoA working party for use by the group. To ensure appropriate credit is given to those bodies and to respect their intellectual property rights, any member providing access to such information, or using it to deliver a presentation, is asked to ensure that the particular body is happy with this use, and that the source is properly credited.

The IFoA takes the issue of plagiarism extremely seriously. It is individual members' responsibility to ensure that they take the appropriate steps to ensure any data or information which is shared with a working party or other group is properly referenced and/or attributed to the source and all necessary permissions have been obtained.

View more information in the Guidance for Member-Led Research Working Parties

5.3.4 Conflicts of interest

Volunteer members of boards, committees and working parties must abide by the Conflicts of Interest provisions in the Actuaries' Code; and should consider the guidance produced by the IFoA in its Conflicts of Interest guide for members.

Please also note that Chairs must ask the members of their group if they have any interests which they need to declare and members must speak up if there is anything which may cause an issue.

View the IFoA's Conflicts of Interest Guide for Members

5.3.5 Handling Third Party Data as a volunteer

The following sets out guidelines for members who require to use Third Party Data as part of their working party research.

IFoA working parties occasionally use Third Party Data to support the evidence base and analysis of their research. Sometimes this involves the IFoA acquiring data on behalf of the working party and it may or may not involve the payment of a licence or administration fee. In most cases, the third party usually requires the IFoA to enter into a contract which covers data security, including handling, retention and destruction, even when no monetary consideration is involved. The liability of the IFoA can sometimes be unlimited.

The IFoA is able to facilitate requests for such data. The following guidelines have been compiled to ensure the volunteers are supported as part of this process:

- any contractual agreement must be entered into by an IFoA staff member and not volunteers
- volunteers will be asked to observe any conditions around the handling of the data

  Conditions can typically include:

  - members only being permitted to access the data on named IFoA premises
  - IFoA IT equipment being used
  - no rights to copy or transfer the data
  - tight controls on retention timelines for the data
  - strict requirements around the method of data destruction, for example secure file shredding software
  - prescribed wording in quoting data or analysis in written publications

- volunteers may sometimes be asked to sign an agreement to acknowledge any conditions in place. This in itself can often act as a useful guide to volunteers
- the working party should inform IFoA staff if the named members are to change
- volunteers may be required to provide any relevant evidence over the handling of the data, if subject to an audit at a later date
- relevant laws must be adhered to at all times (for example, the General Data Protection Regulation).

The IFoA staff will be able to advise on the practicalities relating to the points above at the time of a data request. If you have already embarked on using Third Party Data and wish to check the terms of the contractual arrangements, please contact your key IFoA staff contact, or the **Research and Knowledge team.**

5.3.6 Complying with the Bribery Act 2010

The Bribery Act 2010 is an Act of the Parliament of the United Kingdom that covers the criminal law relating to bribery. It was introduced to Parliament in the Queen's Speech in 2009 and received the Royal Assent on 8 April 2010.

As the IFoA is registered in the UK all volunteers acting on behalf of the IFoA must comply with the provisions of this Act and the IFoA Anti-Bribery and Corruption Policy, no matter where they are located. This is especially important for anyone undertaking the marking and setting of the IFoA's exams.

Please note that any form of "financial or other advantage" is a bribe under the Act. "Financial or other advantage" has a broad meaning and could include payments, awards of contracts and non-monetary gifts. Hospitality is not prohibited by the Act but any hospitality which is offered to any individual in their capacity as an IFoA volunteer, or if you think it could be seen to be offered in that way, requires you to record that offer of hospitality in the IFoA's gifts register. This will protect both you and the IFoA if there was ever a challenge to the nature of the offer.

Details of how to deal with offers of hospitality or gifts can be found in our Gifts and Hospitality Policy.

If you have any questions about the Bribery Act please contact the IFoA's **Head of Legal Services** and if you wish to record something in the gifts register contact the **IFoA's Company Secretary.**

5.3.7 Disciplinary proceedings and criminal convictions

Every individual who supports the Institute and Faculty of Actuaries (IFoA), be that as a volunteer (member or non-member), or in any other role, needs to be aware of how formal proceedings impact on their role or potential role.

We recognise that this will only be applicable to a very small number of individuals, however, it is important you read the policy and ensure you disclose any relevant information in a timely manner.

View the Disciplinary proceedings and criminal convictions policy

5.3.8 Ethical considerations

Research that involves human data can be subject to a number of ethical as well as legal considerations. From a legal perspective, the handling of data/information relating to, and capable of identifying, living individuals must only be done in compliance with the Data Protection Act. Examples of research which has implications requiring ethical approval, as well as requiring compliance with the General Data Protection Requirements (GDPR), may include interviews, questionnaires and surveys, observation of human behaviour or any research involving data relating to individuals.

If you think that the work you are undertaking as a volunteer involves the processing or use of human or personal data capable of identifying a living individual, please contact the **Research team**.

Institute and Faculty of Actuaries

6 Sharing best practice

In this section, we aim to build up a resource which allows volunteers to learn from each other and to share examples of best practice. We hope this section will be especially helpful to members who are volunteering for the first time.

If you have any suggestions, please **'ask a question' or 'make a suggestion' using this link.** We are keen to hear your views and to understand what you would find helpful.

6.1 Making use of our Professional Support Service

In the course of your volunteer role/task please remember you can call upon the support of our Professional Support Service. This service offers you the opportunity to submit questions to a panel of experienced practitioners on the application of the following professional and technical standards:

- the Actuaries' Code
- IFoA Standards (APSs) (GNs)
- Technical Actuarial Standards (TASs) issued by the Financial Reporting Council (the FRC).

Queries are anonymised by the IFoA's staff before being issued to the relevant panel for consideration.

If you have a query, you can submit it using the **online portal** on our website, where you can also find more **information** about the process.

6.2 How to request additional resources

If your committee or working party/research group requires additional resources you should speak with your key IFoA staff contact and he or she will guide you in how best to seek that support.

The following will also provide you with information on the available options.

6.2.1 Extra volunteer support

If, at any time, you find you need extra input from another volunteer, please speak to your key IFoA staff contact or contact the **Engagement Team,** who will help you put a call out to members via our **volunteer vacancies webpage.** Once the advert is on our website you can highlight it to anyone you regard as ideal for the role and encourage them to volunteer. The Engagement team, working with colleagues, will also:

- collate all expressions of interest and share this information with you
- provide you with information to allow you to make contact with potential volunteers to allow you to decide who best to appoint

6.2.2 Extra IFoA staff support

If you feel you require additional IFoA staff support, to assist you with a specific project or to help with an area of expertise, contact your key IFoA staff contact to discuss this with them.

6.2.3 Funding

From time to time, you may find that your research working party/group requires additional input that comes at a cost. For example, purchasing Third Party Data or engaging a research assistant. The IFoA can sometimes provide some funding to support this. If your group requires funding for a research related activity, please get in touch with your key IFoA staff contact who will be happy to guide you through the process.

In short, a business case for this expenditure, and any other necessary expenditure, will be required and you will be provided with an application form to complete.

Please also note that, once approved, any contractual agreement must be entered into by a member of the IFoA's staff and not by a volunteer themselves

6.3 The IFoA Foundation – how to get involved

The IFoA Foundation aims to support the encouragement and advancement of Education, Research and Study in Actuarial Science and related subjects, around the globe. If, as a volunteer/volunteer group, you would like to get involved in fundraising and/or have ideas or activities which you feel progress the purpose of the Foundation, please contact the Foundation to find out how to get involved. **Read more about the IFoA Foundation and how to contact the Trustees**

7 Recognition and reimbursement

In this section we highlight some of the ways we show our appreciation for your help and support. This section also includes a link to the expenses policy and information on how and when you can claim CPD for volunteering.

7.1 Volunteer recognition pins

We at the IFoA want our volunteers to know that we recognise the time commitment and support which is given to the IFoA by our volunteers. We want to ensure we say thank you to you, but also say thank you in a tangible way. Some of the ways include:

7.1.2 A digital volunteer recognition pin

As a result of a suggestion from an IFoA volunteer we have created digital volunteer recognition pins for use on email signatures and sharing on social media, so that you can display your commitment to the profession and encourage colleagues and peers to volunteer. There are three designs to select from.

"The silver volunteer recognition pins were launched back in 2012 and with the new digital pins members can promote the importance of volunteering through their network more frequently." ***Ben Stroud***

Anyone who is an IFoA volunteer and would like to receive a digital pin should contact the [Engagement Team.]

7.2 About our volunteer expenses policy

The IFoA has a Volunteer Expenses Policy, in place since 2016, which has had some revisions made in January 2020. You can view this policy on the **volunteer expenses policy webpage**. This policy is a principle based approach. At the heart of this policy is the following:

We ask our volunteers (and all who support the IFoA, including IFoA staff) to stop and consider the following before agreeing to incur a charge: ***"does the expense represent value for money for members and is there a budget from which this can be taken".***

All expenses must be approved **before** they are incurred, to allow for effective budgeting. **Please remember to contact your IFoA staff contact before booking travel, to ensure it is covered under the policy.**

In line with our diversity strategy we want to continue to move away from volunteers meeting round a table in one of our offices. We want to widen our opportunities to all members and to encourage more interaction and engagement to take place using collaborative tools, including secure file sharing, video conferencing, and of course email. This not only allows more members to get involved but saves members time – avoiding unnecessary travelling time. Of course, we recognise there are times when someone physically has to be in a location to undertake their volunteer role/task, and that is absolutely fine and justifiable. The policy is flexible. We also recognise the merits in meeting face to face and building rapport but we ask you to keep this to a minimum (perhaps once a year).

If you would like to find out more about this policy and how to use it, you can do so in a number of ways:

- visit the volunteer **expenses policy webpage**
- speak with your key IFoA staff contact, or Chair
- **'ask a question' or 'make a suggestion' using this link.**

7.3 CPD opportunities for volunteers

Many volunteer positions may offer members the opportunity to gain CPD. These opportunities can be part of a member's lifelong learning, offering a chance for professional and personal development.

Any activity undertaken in a volunteer role can be counted towards your CPD requirement if you consider that it meets the definition of CPD:

"*Activities that involve development and learning relevant to a Member's Actuarial Work (current or future) or professional development, which address a personal development need and have an identifiable Learning Outcome*".

A Learning Outcome is knowledge or skills gained as a result of taking part in the activity.

For more information, you should check the terms of the **CPD Scheme** to find out how this will apply to you.

Institute and Faculty of Actuaries

8 The Governance Manual

The current Governance Manual was approved by Council.

View the Governance Manual

If you have a query relating to the Governance Manual please contact **James Harrigan** or **'ask a question' or 'make a suggestion' using this link.**

8.1 VIP risk management

If any volunteer identifies any potential or significant risk please contact the Chief Risk Officer, **Charles Toomer**, at any time, to discuss any issues or concerns which they may have in relation to risk management.

Institute and Faculty of Actuaries

9. The different types of volunteering: examples to consider

Some volunteers have asked if we could briefly highlight some of the different ways in which they could become more involved in volunteering for the IFoA. This initial list focuses on the generic types of activity:

- online feedback group
- writing articles and research papers
- carrying out a book review
- speaking at events, making a presentation, or attending a career fair
- becoming a CPD Co-ordinator or Student Employer Contact for your organisation
- taking up a role to support our qualifications
- representing the IFoA at external meetings or events
- putting yourself forward for election to Council
- putting yourself forward to join a board, committee, working party, or editorial or review panel.

Institute and Faculty of Actuaries – "Tips and Hints" Series

No 1 – Chairing Meetings

Introduction

Time is precious. None of us wants to attend a dull, unproductive meeting. When you're in the Chair it's your role to make the meeting the best it can be. What does this mean and how can you help it happen? This short guide gives you some tips and hints that will help you get the most out of every meeting you chair.

Preparation

First – meet with yourself. Why are you having the meeting? Be clear about the purpose of the meeting and what outcomes you need to achieve. Think about how you're going to behave in your role as Chair. What would you like others to say about how you chair the meeting?

Logistics

Ensure all the practicalities are covered:

- ***Participants*** – make it clear if anything needs to be done in advance of the meeting. Invite only those people who are essential to achieve the meeting's purpose. Others can be sent the minutes if they need to know the outcome but aren't required in the meeting itself. Also, consider the option of having people participate only in the sections that are relevant to them.

- ***Timing*** – decide how much time you really need for the meeting. Inform all participants of the start and end times, and stick to them.

- ***Agenda*** – this vital document gives a structure to your meeting and helps ensure all your objectives are covered, so leave plenty of time to plan it – co-create it with other participants if necessary. State the purpose and desired outcome for each item: is it to agree a decision; is it to develop some ideas; is it simply a point of information? Consider posing a question that you are trying to answer – it helps people to focus creatively. Circulate the agenda well in advance – ideally at least a few days before the meeting along with any supporting papers.

- ***Location*** – make sure all the participants know where the meeting is to be held and that all required facilities, equipment and refreshments are booked and prepared.

- ***Meeting responsibilities*** – assign someone to record the minutes and aim to circulate the notes within three days of the meeting. Have an 'owner' for each agenda item, whose responsibility it is to lead that item – it may be you or it may be someone else depending on the topic. Your role as Chair is to introduce it; set expectations; guide if appropriate and summarise any agreed actions at the end of the item.

During the meeting

- ***Meeting protocol*** – when you first take on the role of Chair, be clear about the behaviours you expect to see in the meeting, for example:

    - Deadlines for circulation of agenda / papers / minutes
    - Use of phones / checking emails
    - Listening to and respecting one another's contributions
    - Commitment to delivering on agreed actions
    - Cabinet responsibility for consistent communication from the meeting
    - Periodic review and evaluation of performance.

- ***Your role as Chair*** – it's your responsibility to ensure that the meeting runs to time and is productive, achieving the purpose you'd decided in advance. How do you get everyone's best contribution? All of the above helps. You could also:
    - Welcome people – put your participants at ease and restate the purpose of the meeting
    - Introduce each topic, handing over to others as required to lead specific items
    - Encourage and ask for contributions, be alert to what's not being said – invite those who haven't spoken to add their thoughts if they wish to
    - Summarise agreed actions so that everyone is clear about what is going to happen after the meeting and who is responsible
    - Manage the time effectively on each agenda item
    - Summarise more complex discussions as required and be prepared to challenge and stimulate debate where necessary.

- ***Actions*** – ensure there is a clear process to record agreed actions during the meeting and to track and follow up agreed actions afterwards.

- ***Review*** – at the end of the meeting ask each person to identify one thing that went well for them and one thing that could be done differently. This will help you as Chair and all participants to own the meeting and its outcomes and to continue to improve the effectiveness of your meetings.

This document is part of a 'tips & hints' series produced for the Institute and Faculty of Actuaries as part of their Volunteer Information Pack for their members. It has been produced by The Alliance, a group of experienced coaches. Additional guides, support materials and case studies are available on our website (www.alliancecoaching.co.uk). For further information contact *info@alliancecoaching.co.uk.*

Institute and Faculty of Actuaries – "Tips and Hints" Series

No 2 – Making the Best Possible Contribution to Committees

Introduction

Time is precious. We all want to be part of a productive and rewarding committee. As a member, you have a responsibility to yourself, the Chair and the other members to help ensure time is well spent and that meetings are valuable and productive. What does this mean and how can you help it happen? This short guide gives you some tips and hints that will help you make the best possible contribution to any committees you belong to.

Preparation

First meet with yourself. Why do you want to be on this committee? What is its purpose? What are you and your colleagues trying to achieve? Think about how you're going to behave. What would you like others to say about your contribution? What would make this an enjoyable and successful committee for you to be associated with?

More Preparation

Once you've completed initial preparation above, here are a few more suggestions:

- ***Action –*** have you done everything you agreed you would at previous meetings? Rather than updating everyone each time you meet, is there something you can circulate in advance? Then focus on what really matters whenever you are together.

- ***Committee agenda –*** have you seen the agenda? If not, request it from the Chair.

- ***Pre-reading –*** read any papers in advance. Consider what value you can add/the pertinent questions you think would be valuable for the committee to focus on.

- ***Leading agenda items –*** if you are leading an item, be clear in your mind and to others about what you are trying to achieve. Are you looking for a decision to be made in the meeting itself? Is it to share information? Share learning? Is it to stimulate discussion and generate recommendations? Can you circulate something in advance with perhaps two or three questions you would like people to think about? This can often help stimulate a more productive conversation and outcome. Agree with the Chair in advance how long you will need for your item.

- ***Location –*** do you know where the committee is going to meet? Are you able to get there in plenty of time? Or, if you're unable to attend in person, do you have the dial-in details?

At Committee meetings

When you come to attend the committee meetings themselves, think about how you're going to 'be':

- Arrive in good time. Give yourself a moment to be fully present and to leave behind the meeting you've just come from or the emails you have just read.

- Be sure to introduce yourself to anyone new, you don't recognise or don't know.

- If you are someone who is naturally quiet or needs time for reflection, nevertheless try to seek opportunities to speak as early as you can as this will make it easier for you to make further contributions as the meeting progresses.

- Conversely, if you are someone who naturally likes to interject or voice your opinion, try to become more aware of others. Try to listen more and do your best to give others space and time to contribute as well.

- If you are leading an item, stick to the agreed time; be clear about the purpose and desired outcomes of the item; summarise agreed actions, next steps and who is responsible for making them happen. This is very helpful for the minute-taker, as well as having the added benefit of closing an item with clarity.

- Listen with the intention of seeking to understand and appreciate what is being said rather than, as often happens, simply listening for the opportunity to get your own point across.

- Remove distractions such as Blackberries and smart phones. If you are expecting an urgent call or email then notify the Chair at the beginning or prior to the meeting.

Review

After the meeting, ask yourself:

- Was that one of the best meetings you have been to? If so, what made it so? If not, what can you do to make the next one better?

- What was the one thing you found of greatest value from the meeting?

- What did the meeting achieve?

- What might you do more of/less of/differently next time?

This document is part of a 'tips & hints' series produced for the Institute and Faculty of Actuaries as part of their Volunteer Information Pack for their members. It has been produced by The Alliance, a group of experienced coaches. Additional guides, support materials and case studies are available on our website (*www.alliancecoaching.co.uk*). For further information contact *info@alliancecoaching.co.uk*.

Institute and Faculty of Actuaries – "Tips and Hints" Series

No 3 - Sharing your Volunteering Experience on LinkedIn

Introduction

LinkedIn is a well-known and widely used social media site with the focus on business networking. It offers the opportunity to both post information about your skills and experience as well as make connections. One area of the profile that is often underused is the section relating to volunteering experience. In this guide the options for how you show this are explained.

Preparation

Many people joined LinkedIn because they were invited to do so by someone they knew. Whilst some concentrated their efforts on developing and posting a full profile others simply took the opportunity to enter some basic details. Where enthusiastic users have built a large community of connections those who are a bit more cautious are content with a relatively small number. Regular updates, pruning and connecting with new people keep your LinkedIn profile current and interesting. How much time you spend is up to you. Small changes can lead to big outcomes. Before you follow this guide it would be a good idea to revisit what you have there already and whether other aspects of your profile would benefit from being updated or developed.

Why should you add your IFoA Volunteering Experience?

People have differing reasons for volunteering. You might want to give something back, share new knowledge or research, test ideas, gain new skills and expertise, or spend time with like-minded professionals. Whatever the reason, posting information about what you do outside of your day to day work / role can enhance your reputation. You might already have included your volunteer role with IFoA in your profile under "Experience" – many people do – but also including this in the Volunteer section offers other opportunities. The list below should help you consider what else you could do.

1. **Where do you add it?** You will usually find the section for Volunteer below the work and education parts of the profile page if you have not actively moved the sections around. Indeed, depending on the level of your activity generally LinkedIn might be prompting you to add this by way of a box headed "Volunteering Opportunities" directly below the box at the top of the page that includes your picture, name and headline.
2. **Check what others are doing.** If you are unsure what you should include do a simple search for "Institute and Faculty of Actuaries Volunteer" using the search box at the top of the LinkedIn page and press search. You will see a list of those who already include their volunteer activities in their profiles. This should give you some ideas so that you can choose the best version for you.
3. **Entering basic information.** The headings in the drop down box include:
   a. **Organisation –** begin to type Institute and Faculty of Actuaries and the details should appear as an option. By including this, when it is published, the IFoA logo will appear on the right hand side of the entry in your profile.
   b. **Role –** you might have a title or it might simply be that you are a volunteer but either way use this section to also indicate your special area of interest
   c. **Cause-** unfortunately the list offered here by LinkedIn is very limited at present. You may wish to select "Education"; "Economic Empowerment"; or "Science

and Technology" - select the option which feels the nearest appropriate one for you.

d. **Date –** Sometimes volunteer activity is in relation to a specific project or a fixed term. Where your involvement is ongoing click "switch to date range" and this will give the option to say that you are currently volunteering.
e. **Description-** you have an opportunity to explain what you were involved in, how you were involved and what you got from that involvement. If you have had multiple roles you can use this section to explain what they were, why you undertook them. You might find that "clustering" them gives you interesting content with a summary of what that means in the box provided. e.g. as an alternative to listing each separately. Include something about the outputs or outcome, if you can.

4. **Use relevant words.** Just like all the main search engines LinkedIn's search function looks for "keywords" and whatever you include should include those. If you are in doubt about what those might be think about how you would search for a colleague or peer by their experience rather than their name.
5. **Ask for peer review –** by getting a colleague or peer to read what you have written, make observations and suggest changes. You could do the same for them.
6. **Switch off until you are ready to go public –** you will find a "notify your network" button on the right hand side of your profile page. If you are making a lot of changes or are doing this in stages you might want to switch it off until you are happy with what you have done. Switch it back on when you are ready to share.

At present the LinkedIn APP does not display volunteer experiences. This may be included in time but for now it would therefore be wise to include your volunteer experience in both the "volunteer experience" section and in your "general experience" section.

Whatever you choose to do in relation to your online professional profile it is wise to remember that you should commit to regular maintenance to ensure that your information is up to date and relevant.

This document is part of a 'tips & hints' series produced for the Institute and Faculty of Actuaries as part of their Volunteer Information Pack for their members. It has been produced by Jackie Cameron of Cameron Consulting www.consultcameron.com an experienced trainer in using LinkedIn. For further information contact jackie@consultcameron.com

ways to make a positive impact when presenting virtually

If there is one skill that is essential for getting your message across in the current environment, it is the ability to hold your audience with a great online presentation.

The ability to deliver an engaging presentation remains highly valued

The number of webinars, video conferences and virtual meetings, which was already significant, has increased dramatically as a result of the coronavirus pandemic. These will continue to be used extensively going forward. One way to stand out amongst all of the online 'noise' is the ability to deliver a great online presentation.

Our Go-To Professional research indicates that the ability to deliver a powerful presentation is highly valued. As one senior professional told us: "To be able to give a decent online presentation on a technical subject, you really have to understand your material.

It's a great discipline."

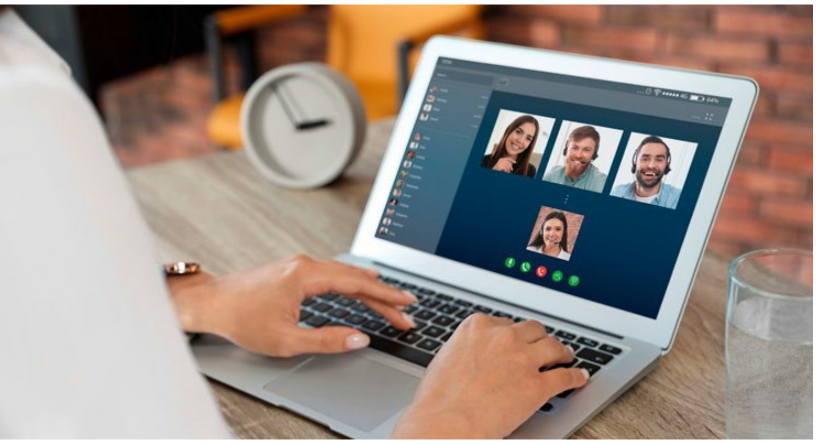
Another added “I’ve had many recent work instructions come off the back of webinars I’ve delivered. I have never had the same return on articles I have written.

If there is one skill that is essential for raising your profile, it is the ability to pull together a presentation and deliver it with confidence.”

So what are the secrets of creating a powerful and engaging online presentation? In this Winning Business Digest we share seven of them.

This is one of The Results Consultancy’s Winning Business Digest series which gives practical tips on a range of business development topics

7 ways to make a positive impact when presenting virtually



1 Don't forget the basics

At the end of the day, an online presentation is still a presentation. So, don't forget the fundamental questions of *Who*, *Why*, *What* and *How*. It is a good tip to start the planning for each presentation with a blank sheet of paper. Many presentations will fail to engage because they come across as too generic.

So consider… *Who* is the audience and what is the context, their level of understanding, and a good outcome for them? *Why* are you doing this – what is the point, given that there will be various competing demands on their and your time? Think about the *What* in terms of the content, and the *How* in terms of the way you deliver it.

Try this: *When planning your presentation, really focus on questions of what would make a successful presentation from their perspective as well as yours. Having a clear understanding of the audience will enable you to structure your presentation and deliver in the most appropriate way, taking into account style, degree of formality and any relevant cultural issues.*

2 Be clear about your key messages

We are big fans of the mantra 'less is more'. Many presentations fail to engage their online audience because the key messages are not clear, or there are simply too many of them to take on board. Limit yourself to the key messages you want the audience to understand and take away. Many argue that people can only really retain three key points.

Decide in your mind what you want the audience to do as a result of your presentation, as that will influence the structure and content you create. Think about the key issues on your audience's mind and how you can help them.

Keeping it simple is a good tip and you will certainly impress an audience if you can boil an argument down to its bare essentials and convey the essence of a concept in plain language. Also remember

3 Familiarise yourself with the technology

There is nothing more stressful for a presenter of a webinar, or a leader of an online meeting, to be unsure of the underlying technology and how it all works. Almost everyone has been in a virtual audience when a failure of the technology, or a failure of the presenter to use it properly, has prompted them to disconnect.

The vital rule for any presenter is to practise so that you know how the underlying technology works. And these days, it's not just about knowing one system. Zoom, WebEx, GoToMeeting, Skype, BlueJeans and Microsoft Teams, just to mention a few, all have similar functionality but are all different in the way they operate. The time to find this out is in your rehearsal, not during your live presentation!

The reason we say this is that audiences draw conclusions on your competence as a professional, not just from your knowledge of the subject matter you are discussing, but also from your ability to be 'in control'.

Avoiding the flustered comments we've heard such as 'I don't know what's happened there', or 'can you see my screen?' relies on the presenter knowing how to 'drive' the presentation technology and take action in the moment, in a calm way. Waiting for the technical expert to arrive is usually not possible or desirable.

We cannot control broadband usage of others, but make sure you are close to a router if presenting from home or even have a wired connection to connect your laptop to the internet. Make sure that other devices are switched off to give you as much local bandwidth as possible.

Try this: *Familiarise yourself with the technology you are going to use for THIS online presentation, so that you avoid the obvious pitfalls and are not learning on the job as you deliver your session.*

If you have the choice, select the platform that you are most familiar with. This will give you comfort and confidence.

If you have to use a different platform (e.g. you are one of several speakers, and using another organisation's system) build in time for a dry run so that you know how topress the right buttons at the right time.

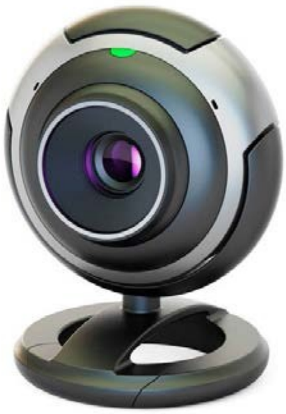
Start at the absolute basics – does your firm's IT system and firewall allow that particular presentation platform to be used? Do you know how to log in and have you been given the right password?

to structure the presentation so the call to action or 'hook' isn't just buried towards the end.

Try this: *When developing your presentation build it around this rough structure to ensure it has a clear and logicalflow:*

1. *Briefly introduce and signpost the topic/issue you will be covering and the key message(s)*
2. *Explain the topic/issue in more depth*
3. *Summarise by re-emphasising the key message(s) and point to the next steps/ further action for your audience to take*

Help your online audience to absorb and retain the key messages you want them to take away. Some of the most notable presentations are remembered, not because of the density of their content, but by the breathing spaces they incorporated.



4 Practise and get the environment right

As you would for any presentation, you have to practise and practise again. Presenters relying on notes, or too heavily on their slides, is hardly a way to inspire confidence. When presenting online, this can be even more obvious as presenters break eye contact.

To start with, you might wish to write out some of your key points but do not rely on a script. As you practise, and that includes speaking the words out loud, the flow will develop and you will be aware of phrases which may trip you up or words which may be repetitive. Try and get some feedback to help you come across as natural and confident in your delivery.

Practise in front of the camera, in addition to doing a technical rehearsal to test the platform you are using. Find a quiet and well-lit space with an uncluttered background. Try and raise your laptop or webcam so it is close to your horizontal eye line to avoid slouching.

Try this: *Practise out loud to fine tune your delivery and make sure that your key messages land Remember not to speak too quickly in the rehearsal as well as the actual presentation and use pauses to help you get your messages across. Be aware of the key words you need to emphasise and how to modulate your tone. This is particularly important when you are not visible to an audience.*

5 Manage your energy levels

For many people, it can be a lot easier to get their energy from a live audience in the same venue rather than a virtual situation. We also need to make sure we make a positive impact on the small screen. Try and get in the 'zone' before your presentation with some warm-up techniques and get the right energy from the start.

Carry Clubb who leads Actors in Industry has some great tips in this area, including thinking of ways to measure energy on a scale of 1-10, or low to high. Carry has a great expression of "Switch on at 7" to have that initial positive impact.

We also need to be aware of the danger of energy levels slipping. We can convey positive energy from our body language, eye contact, facial expression, hand gestures and voice. When done well, hand gestures will help convey openness and trustworthiness.

Try this: *Use your voice, facial expressions and body language to convey energy Some warm up exercises beforehand can help, of course. Be aware of your own style and try and make sure that you use hand gestures in an appropriate way to reinforce key points and convey credibility.*

6 Make it engaging

Think about your audience's energy and their attention span. It is a lot harder to maintain that attention on a virtual presentation than in a real face-to-face environment. Think about how you can connect with your audience with an understanding of their situation and some empathy. Make your audience think.

For internal or certain client briefings it may be useful to send round update information in advance, so the discussion is spent focusing forward. Encouraging questions throughout is an obvious way to encourage interaction although the presenter/ facilitator still needs to maintain a level of control.

What engagement devices can you bring to bear? A good opening helps, of course. Could that be a compelling statistic, a story, an analogy, a question, a hypothetical situation or a quote rather than just running through an agenda? A theme can be useful and one you can keep bringing the audience back to. Key facts, statistics, stories, props, demonstrations and strong visuals can also be part of the toolkit, of course. Photos, models and videos can be extremely helpful.

Many people will be using things such as online polls or virtual break-out rooms if the session lends itself to small group discussions at some point. One thing to bear in mind is whether all engagement devices add to the overall presentation to avoid using things for the sake of it and appearing 'gimmicky'.

People tend to stuff presentations full of detail endeavouring to give the audience everything they need, or may have questions about. In contrast it is better to hold a little back. One thing our multi-channel and busy world has achieved is to make attention spans even shorter.

LOWEST HIGHEST

Try this: *Think about what will support your key messages Attention span will normally be shorter during an online presentation. Stories and case studies are especially helpful in terms of bringing situations to life, and demonstrating your capabilities. Where have similar challenges happened before and how did you deal with them? Stories tend to be a lot more memorable than just facts.*

In live facetofacepresentations, the presenter gets immediate feedback from their audience, but in virtual presentationsthereisnone of that. It is the presenter’s responsibility to create content that is likely to be engaging from the outset.

7 Think about the next step

The planning process will help you think about the point of your presentation and what you want your audience to do as a result of attending. In fact, a 'call to action' is a great way to ensure there is some sort of follow up.

For some presentations, particularly those which are designed to impart information to a wide audience, the follow up might be as simple as making materials and contact information available as well as a recording of the session. There are many more proactive things which can be done, of course, such as a one to one follow up or asking participants to share particular goals or targets in internal sessions.

Whilst we may feel the key points and calls to action in our presentation are clear to us, our audience may not be so sure – and it is hard to assess this remotely. It is important then to select a next step which is easy for them to take and to make it very clear. Re-emphasise this step in your summary so they're left with the call to action fresh in their mind.

Try this: *Devise a next step which gives help, insight or guidance to a common issue or challenge your audience may be facing. Make it easy for them to undertake, for example sending a quick email, giving a call, downloading a guide etc. so they can fit it easily into their schedules.*

Take a proactive stance and build hooks into your presentation that create a chance for further dialogue with those who have attended.

Summary

Powerful online presentations invariably come from clarity and the ability to get a message across in plain language that an audience understands. The presenter needs to have a good understanding of his/her audience and empathise with them in order to harness their interest and engagement.

They also need to think more broadly, not just about the content of their presentation, but also the overall experience they're hoping to create. What do they want the audience to think, feel and do after the virtual sessions?

For business presentations there will be a goal that all the effort will lead to something. Building in attractive and easy to follow next steps, and guiding an audience to them, will ensure the effort in preparing and delivering

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