



Institute  
and Faculty  
of Actuaries

# Volunteering for the IFoA ...get involved



## The Volunteer Information Pack (VIP)

Thank you to all who support the Institute and Faculty of Actuaries (IFoA), be that as a volunteer (member or non member) or in any other role.

We hope you find the VIP to be a rich library of material.

# An introduction to your Volunteer Information Pack

First created five years ago, this Volunteer Information Pack (VIP) is an online resource created as a useful ‘one stop shop’ for 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.

It allows you to dip in and out of this rich library of material and it enables you to find a quick answer to a question about IFoA governance, strategic direction, or to benefit from some of the helpful tips and ideas which have been included to assist you. It quite literally brings together all the material that has been created throughout the IFoA to assist a volunteer.

We are extremely grateful to you, one of nearly 4,000 individuals who give your time to provide support to the IFoA. Your willingness to share your expertise, to drive forward your profession, cannot be understated. As a profession, we are very lucky to benefit from outstanding member engagement. Put simply, without you we could not deliver on our annual Corporate Plan and realise our Strategy.

As a global community, volunteering opens up a wealth of networking opportunities and a chance to learn from others within a different jurisdiction. We encourage you to embrace this benefit and rich diversity of skill sets and experience. We would love to hear your ideas of how we can make this even better, and more open.

You are the link between the IFoA Executive and its membership: this crucial partnership is one of our greatest strengths. This collaboration is the embodiment of the IFoA’s values and behaviours - Community, Integrity and Progress. We want to thank you (and indeed all volunteers: past and present) for all you do. What you do now will build a legacy for the future.

With all rights and opportunities come responsibilities and we ask all our volunteers to comply with the terms of the IFoA's Governance Manual and the VIP. Each IFoA volunteer will receive support from at least one member of the IFoA's Executive staff. This individual will support and guide you.

To show how volunteering can enrich an individual's lifelong learning, we recently launched "Inside story" in The Actuary magazine: you can find out more on page 45 of the VIP. We encourage you to take a look. Above all, whether you are starting a volunteering role for the first time, or are an experienced participant, we hope that you enjoy your involvement and know that we value your support.

**Thank you for getting involved and supporting your profession.**



A handwritten signature in blue ink that reads "M. Ngwenya".

**Marjorie Ngwenya**

President, Institute and Faculty  
of Actuaries



A handwritten signature in blue ink that reads "Derek Cribb".

**Derek Cribb**

Chief Executive, Institute and  
Faculty of Actuaries

With our grateful thanks  
to all who support the IFoA



# Some questions to ask yourself when volunteering for the IFoA

## **For all volunteers:**

- 1 Can I claim CPD for my volunteer activities?  
*(Answer: see section 7.5 in the VIP)*
- 2 Are any of the IFoA's guidance booklets and 'tips and hints' series helpful in my role?  
*(Answer: see section 6.2 in the VIP)*
- 3 Does the research which I am carrying out for the IFoA have the relevant permissions for use and am I aware of the IFoA's open source policy?  
*(Answer: see section 5.3 in the VIP)*

## **For Chairs and Deputy Chairs:**

- 4 Do I know how the work of my volunteer group contributes towards the IFoA's bigger picture?... and how it fits with the Strategy and Corporate Plan?  
*(Answer: see section 3.3 in the VIP)*
- 5 What aspects of the IFoA's Governance Manual are relevant to my board/committee/working party?... and do I know where to find a copy of the 'Key information for Chairs/working party Chairs'?  
*(Answer: see section 8 in the VIP)*
- 6 How do I obtain extra resources if I find my board/committee/working party needs help?  
*(Answer: see section 6.3 in the VIP)*
- 7 Is my group considering publishing a piece of research or speaking to the media?  
...and have I spoken to the public affairs team to obtain their support?  
*(Answer: see section 5.1 in the VIP).*



# VIP contents page

The VIP is located in the 'Get involved' section of our website: [www.actuaries.org.uk/vip](http://www.actuaries.org.uk/vip)

## **1 Letter from the President and Chief Executive - June 2017**

## **2 What you need to know**

- 2.1 How best to use the Volunteer Information Pack (VIP)
- 2.2 Some questions to ask yourself when volunteering for the IFoA
- 2.3 Acknowledgements

## **3 Useful information**

- 3.1 Role/task descriptions
- 3.2 Terms of reference
- 3.3 The IFoA Strategy and current Corporate Plan
- 3.4 Structure
- 3.5 Key contacts within the Executive staff
- 3.6 Involving your employer
- 3.7 Involving international members
- 3.8 Involving student members

## **4 Working in partnership – volunteers and Executive staff**

- 4.1 Working together: who does what?
- 4.2 The IFoA values and behaviours
- 4.3 Suggestions about managing commitments and avoiding volunteer burn-out
- 4.4 How to find us, and how to join video and telephone conference calls

## **5 Protecting you and the IFoA**

- 5.1 Representing the IFoA – speaking out and how we can support you
- 5.2 Information on our policies
- 5.3 Legal considerations – e.g. competition law, confidentiality, conflicts of interest and handling third party data



## **6 Sharing best practice**

- 6.1 Learning from others - opportunities to develop
- 6.2 Guidance booklets and 'tips and hints' - including 'Chairing Meetings'
- 6.3 How to request additional resources

## **7 Recognition and reimbursement**

- 7.1 Thank yous – parties and pins
- 7.2 Outstanding contributions
- 7.3 Professional Development and Responsibility (PDR) roles
- 7.4 Volunteer expenses policy
- 7.5 CPD opportunities for volunteers

## **8 Good governance**

- 8.1 The Governance Manual
- 8.2 Meeting management
- 8.3 Appointing lay members
- 8.4 Putting things right
- 8.5 VIP risk management

## **9 Succession planning – your legacy**

- 9.1 When and how to ensure your good work is carried on
- 9.2 The different types of volunteering: examples to consider
- 9.3 Directory of volunteering opportunities – next steps
- 9.4 Volunteer case studies/experiences – and mentoring others
- 9.5 The volunteer journey

If you have any questions please speak to the Executive staff contact who supports you or email Debbie Atkins, Head of Engagement (e: [debbie.atkins@actuaries.org.uk](mailto:debbie.atkins@actuaries.org.uk))

# Community Integrity Progress

## The IFoA's values and behaviours

Five years ago, the IFoA developed a values and behaviours framework through consultation with Executive staff, Council, members and external stakeholders in line with our organisational brand and personality. Our values, Community, Integrity and Progress, set out what the IFoA stands for, what we do and how we do it. They drive our decisions, reflect our beliefs and unite us as one organisation – establishing a collective purpose and consistent way of doing things so that together, whether volunteers or staff, we will deliver our strategy and grow the reputation and trust of our audiences.

The behaviours identified in the framework will deliver the values so that all audiences have a consistent, positive experience of us as a high-profile, sustainable, international organisation that provides high quality services to its members.

I look forward to working with our many dedicated volunteers and enthusiastic staff to achieve the goals set out in the Corporate Plan and make sure our values are embedded in all that we do.

Many thanks for your partnership in this.

**Derek Cribb**

Chief Executive Officer, Institute and Faculty of Actuaries



Community	Integrity	Progress
<p><b>We are:</b> Building relationships and communities by listening and giving people a clear voice.</p>	<p><b>We are:</b> Doing the right thing for the organisation, our members, the profession and the public interest.</p> <p>Integrity is of course at the heart of the Actuaries' Code.</p>	<p><b>We are:</b> Developing the future of the profession together.</p>
<p><b>Examples to consider when volunteering:</b></p> <ul style="list-style-type: none"> <li>• Do I listen to everyone's point of view?</li> <li>• Do I recognise that some members and staff may need encouragement to speak up and share their ideas and do I help them to find their voice?</li> <li>• If I ever attend a poorly run meeting what could I do personally to help change things and make this better?</li> </ul>	<p><b>Examples to consider when volunteering:</b></p> <ul style="list-style-type: none"> <li>• If I say I can do something, do I ensure that I deliver, and if I cannot, do I ensure I tell my Chair or the relevant staff member as soon as possible?</li> <li>• Do I respect whatever confidentiality restrictions apply to my volunteering work?</li> </ul>	<p><b>Examples to consider when volunteering:</b></p> <ul style="list-style-type: none"> <li>• Do I ever fall into the trap of doing things the way they've always been done without thinking if they could be done in a better way?</li> <li>• Am I open to new ideas and ways of doing things?</li> <li>• Do I try to seek and embrace feedback?</li> </ul>



# Getting involved...

The VIP is a constantly evolving resource: if you particularly like a section, or identify something which you feel is missing, we would value that feedback. Please contact our Head of Engagement: **Debbie Atkins**, to share your thoughts.

## How to volunteer:

Find out more on our website: [www.actuaries.org.uk/get-involved/volunteering-ifo](http://www.actuaries.org.uk/get-involved/volunteering-ifo)

Where you can view:

- Volunteer vacancies
- What you need to know
- The Volunteer Information Pack (VIP)
- The Directory of Opportunities
- Volunteers' Experiences
- Benefits for members
- Benefits for employers

All of the IFoA's volunteer opportunities, including opportunities to mark exams, are advertised on our website on the volunteer vacancies webpage. When visiting this webpage:

- Click on the heading to view full details
- Match your skills and experience with a relevant role
- You can filter the list of vacancies
- For the majority, location is not a barrier

To find out more about any of the above, please contact:

**Debbie Atkins LLB (Hons)**

Head of Engagement

Email: [debbie.atkins@actuaries.org.uk](mailto:debbie.atkins@actuaries.org.uk)

Tel: +44 (0) 131 240 1803





Institute  
and Faculty  
of Actuaries

## Beijing

14F China World Office 1 · 1 Jianwai Avenue · Beijing · China 100004

Tel: +86 (10) 6535 0248

## Edinburgh

Level 2 · Exchange Crescent · 7 Conference Square · Edinburgh · EH3 8RA

Tel: +44 (0) 131 240 1300 · Fax: +44 (0) 131 240 1313

## Hong Kong

1803 Tower One · Lippo Centre · 89 Queensway · Hong Kong

Tel: +852 2147 9418

## London (registered office)

7<sup>th</sup> Floor · Holborn Gate · 326-330 High Holborn · London · WC1V 7PP

Tel: +44 (0) 20 7632 2100 · Fax: +44 (0) 20 7632 2111

## Oxford

1<sup>st</sup> Floor · Park Central · 40/41 Park End Street · Oxford · OX1 1JD

Tel: +44 (0) 1865 268 200 · Fax: +44 (0) 1865 268 211

## Singapore

163 Tras Street · #07-05 Lian Huat Building · Singapore 079024

Tel: +65 6717 2955

[www.actuaries.org.uk](http://www.actuaries.org.uk)

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