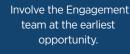




Volunteer recruitment



To ensure an open and transparent appointment process, all volunteer roles must be advertised on the IFoA's volunteer vacancies webpage **www.actuaries.org.uk/volunteer vacancies**

Advert (including any
Task and Person Specification/
Terms of Reference)
added to the website on the
volunteer vacancies webpage.

As expressions of interest are received, each individual will receive a personal response from the Engagement team within three working days.

Advert promoted in IFoA newsletters on social media and to individuals who have asked to be kept informed of volunteering opportunities. This will be done by the Engagement team.

The recruiting IFoA staff contact/board or committee should also highlight the vacancy to people they know and encourage them to volunteer.

After the closing date the list of potential volunteers, and their supporting information, will be passed to the selection panel.

This information will be emailed to the IFoA staff contact supporting the group who are responsible for recruiting.

This member of staff will liaise with the selection panel and follow up with potential volunteers within two weeks. (see over)

Selection panel review all offers of support. Additional information may be requested and for senior roles a telephone or face to face interview is arranged.

A simple matrix is provided to assist with the selection. (see over)

The IFoA staff contact will seek

approval of the appointments from

the relevant reporting board/group.

Appointments are made on merit.

The IFoA aims to keep this as

and transparent process for all.

If a member is not appointed they will be encouraged to

simple, and flexible, as possible

while ensuring this is a fair, open

consider an alternative role.

Appointment/s made, IFoA database updated, and induction arranged. All appointments must be made using the relevant IFoA appointment template.





Further explanation:

Identifying need

- Identify the need to recruit a volunteer/s: is this a new role, replacement role, or additional support?
- Ask for help from the Engagement team the sooner the better, this will make it easier for all
- · Complete a volunteer vacancies template: this has been designed to help you
- Ask a member of the Engagement team, to draft, or review, your volunteer vacancy and, where applicable, a Task and Person Specification
- Let the Engagement team know if your vacancy is urgent. There are ways we can help you.

Approval

- Decide who will be on your selection panel and agree a closing date (aim to give at least four weeks)
- Be sure to include sufficient criteria to allow you to select on merit
- Once the advert has been finalised, the call for support will be added to the volunteer vacancies webpage by the Engagement team.

Advertising

- The volunteer vacancies webpage allows you to reach out to all members and others
- The vacancy will also be promoted in the relevant newsletters; sometimes on the home page of the website; on Facebook; Twitter and LinkedIn and at our conferences. The Engagement team will also highlight the volunteer vacancy to anyone who has asked to be kept informed of similar volunteer opportunities
- In tandem, you should also promote it to individuals you know. The Engagement team will be happy to help you with this and to follow up with these individuals for you.

Potential volunteers

- The Engagement team will liaise with all potential volunteers, answer or field queries and co-ordinate all expressions of interest
- The team will collate the information on a potential volunteer form
- After the closing date*, the potential volunteer form will be sent to the relevant IFoA staff contact to share with the selection panel (see over for separate note on selection panels)
- All potential volunteers must be contacted, thanked and advised of next steps (see over). Communication
 to be within two weeks of the closing date* and at regular intervals thereafter.

Decision and appointment

- Once the decision is finalised, approval will be required from your reporting board/group and appointment/s made (see over for the selection process)
- Any unsuccessful candidates are contacted and encouraged to volunteer again
- Potential volunteer forms are deleted and destroyed
- New post-holders are inducted into their role and provided with key information, dates, relevant past papers/minutes/material and key contacts. (Onboarding check list will assist you)

Section 1.59 of the Governance Manual states all volunteer appointments will be subject to an open, fair, and transparent appointment process.

^{*} Some vacancies do not have a closing date. In these circumstances, offers of support are progressed as received.





Selecting the right volunteer

The Institute and Faculty of Actuaries' (IFoA's) volunteer recruitment is fair, open, and transparent. Volunteers are selected on merit.

For selection panels

- Each selection panel should be decided at the time the volunteer vacancy is advertised. Your IFoA staff contact will help you
- Include at least one volunteer and at least one IFoA staff contact. This member of staff will guide the selection panel in all governance matters and keep you right
- The selection panel should be aware of approvals which are required from their reporting board and should build this into their process
- After the closing date, the selection panel will receive a 'potential volunteer' form. This will contain all expressions of interest. You must be aware that this is personal data
- The potential volunteer form will be sent to the IFoA staff contact co-ordinating the selection panel and this person will be asked to make contact with each potential volunteer within two weeks of the closing date. At this time it is a chance to:
- Make contact
- Ask for more information if required
- Advise of next steps
- Express thanks for the interest
- For senior roles it is important to speak with all short-listed candidates as part of the process. This can be done by telephone, video conference, or face to face, but it is an important requirement
- All appointments must be based on merit
- Create a matrix (see example) to help you reach your decision
- In accordance with the IFoA's Governance Manual, remember to gain approval for your recommendations from the relevant reporting board. This should be recorded in the relevant minutes either at the next meeting as a specific agenda item or in AOB. Remember to build this into the process.

Flexibility in approach

We want this process to be as simple and flexible as possible. If you prefer to conduct this differently, that's fine too, all we ask is for you to keep to these principles and document your decisions.

Dealing with personal data

Please remember that the information provided to you, by these potential volunteers, is subject to the requirements of the General Data Protection Regulation (GDPR). This means that this information is for the selection panel only and must not be shared more widely. It also means that you must destroy all copies of the potential volunteer form, both hard copy and electronic, as soon as the appointments have been made. You will be asked to confirm disposal via email. The outcome will be recorded by the Engagement team and you must arrange for the successful candidate/s to be added to our CRM database.

Additional information

- In making your selection, remember to consider diversity: gender, geography, skill set etc.
- If there is a delay in reaching a decision, it is important to keep in regular contact with all potential volunteers. The IFoA staff contact should ensure this occurs at least once a month.



Role:		
Candidate name/No:		
Selection panel:		
Date:		
Form completed by:		

Volunteer selection

Simple matrix - this is an example that can be tailored by each panel, to assist in making an appointment on merit.

Section one

Points Skills and experience 4 Has evidenced all required skills and experience to carry out the role/task 2 Has evidenced over 50% of required skills and experience 1 Has evidenced some of the skills and experience required 0 Does not have the necessary skills and experience

Section four

Total score per candidate				
Section one				
Section two				
Section three				
Total score				

Section two

Points	Person specification
4	Has all the requirements being sought
2	Has over 50% of requirements
1	Has some of the requirements
0	Does not have any of the requirements

Section three

Points	Time commitment
4	Appears to be able to commit totally
2	Can commit to over 50%
1	Can commit to some
0	Cannot commit

Section five

Comments/overview/reasons

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_		
_		
_	 	
_		

A Word version of this matrix is available from your IFoA staff contact or from the IFoA's Engagement team.

Compliance

The IFoA is committed to delivering a fair, open and transparent recruitment process which appoints on merit.

In line with the General Data Protection Regulation (GDPR) and the recommendations from our external auditors, which were endorsed by the IFoA's Audit and Risk Committee, we have instigated a simple assessment process for all (volunteer) roles. The matrix, above, was approved by our external auditors and the IFoA's Audit and Risk Committee.

If you would like advice on any aspect of the selection process, please contact a member of the IFoA's Engagement team.