



# Volunteer recruitment



## Further explanation:



\* 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
<b>Total score</b>

### 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 five

Comments/overview/reasons

### 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

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.

A copy of each completed Matrix (or decisions) can be given to, and retained by, the IFoA's Engagement team, after each recruitment process is complete.

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