

## **VOLUNTEER PROTOCOL**

*The CFA Society Hong Kong ("the Society" or "we") operates as a registered professional body and a member within a global network. It is managed by a team of executive directors and the staff office (collectively, "the Executive Arm"). The Executive Arm also engages with volunteers with a view to broaden the Society's reach and enhance our members' experience.*

### **Volunteer Acceptance**

The Executive Arm recruits volunteers on a case-by-case basis, through open or targeted approaches. Selection criteria include industry relevance, expertise, passion, social fluency, compatibility, and alignment with the Society's values, among others. Additionally, given that many committees are attended by volunteers, efficient use of group time is crucial. Thus, volunteers should refrain from pursuing personal demands during their services and remain committed to collective missions or goals.

### **Volunteer Engagement**

Volunteering with the Society is a privilege that allows members to make contributions. In return, volunteers receive our acknowledgment or appreciation. Volunteers should not expect to receive any rewards beyond this recognition. As an integral part of the diverse constituency we serve, volunteers are crucial to the Society. Nevertheless, we, as a professional body, are dedicated to balancing the interests of all stakeholders, including both volunteers and non-volunteer members, as well as non-members.

### **Desired Quality of Volunteers**

The Society seeks volunteers who engage with stakeholders respectfully and professionally. Although volunteers are typically chosen for their professed skills and knowledge, volunteers should not presume that their views will always prevail over those of other volunteers or the Executive Arm. To preserve an environment that encourages both civil and productive dialogue, we explicitly reserve the right to terminate the services of any volunteer who exhibits non-cooperative or unacceptable behavior<sup>1</sup>.

In addition, to ensure the integrity and impartiality of our volunteering efforts, we require all volunteers to abstain from using our society events or initiatives for direct marketing of their own or their company's interests as well as any activities that might be perceived as such.

### **Decision-Making Authority**

Different views among volunteers are not uncommon during their service. In situations where consensus cannot be reached or should volunteer proposals are not in line with the Society's goals or agendas, the Executive Arm will exercise its right to make an executive decision, after due consultation with the volunteers and consideration of precedents, and such decision will be final and conclusive.

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<sup>1</sup> For guidance on what constitutes unacceptable behavior, please refer to CFA Institute Engagement Conduct Policy, available at: <https://www.cfainstitute.org/about/governance/-/media/documents/policy/engagement-conduct-policy>