

Terms of Reference:

Employer/Industry Outreach Committee

Effective Date:

November 2020

Purpose:

- Target the relevant companies (small, medium & large corporates) with specific initiatives incl. graduate training opportunities for charter pendings; Asset Manager Code of Conduct (AMC); GIPS2020; Jobs portal to advertise jobs and Sponsorship opportunities
- Develop relationships with employers and other industry professional bodies and set up communication strategy for each of the targeted employers/industry bodies
- Review Employer Outreach initiatives of other societies and adopt where possible

Tasks:

- Identify all target organisations to establish relationship (primary & secondary point of contacts)
- Assist the CFA Board and other relevant committees with marketing the value of achieving the CFA®/CIPM® designations and the CFA Investment Foundations Program (in conjunction with Career Services Committee)
- Marketing of the CFA Institute Career Portal to Members/recruiters/companies (in conjunction with Career Services Committee)
- Reach out to target organisations to establish areas of collaboration including Presenter/Speaker and sponsorship opportunities (in conjunction with Executive Office, Programme Events and WIM & Diversity Committees)
- Promote the adoption of the Asset Manager Code of Conduct (AMC) (in conjunction with Advocacy & Regulator Outreach Committee)
- Raise awareness of GIPS2020 (in conjunction with Advocacy & Regulator Outreach Committee)
- Evaluate the introduction of corporate sponsorship of companies to CFA Society South Africa
- Raise awareness of the two types of memberships
- Within target employers create awareness of and create appreciation for the role that CFA Society volunteers play in advancing the industry
- Participation in Employer Recognition Awards (C Suite Event)

2020 Measurable KPIs:

- Identify and establish relationships with the relevant companies and industry bodies
- Increase the number of signatories of CFA AMC by 10%
- Publicise the list of AMC signatories to enhance the appeal for managers to be signatories.
- Proposal on the feasibility of introducing corporate sponsorship of companies to CFA Society South Africa for consideration by the board
- Establish how many of the target companies and CFA SA members attend CFA Society Annual Investment conference as well as the CFA Institute Global Investment conference.

Committee Structure & Operations:

1 – Chair

Lwando Moni

2 – Committee Members

Delphine Govender

3 – Volunteers

Rosanne Howarth

Nicola Gubb

4 – Meeting Frequency (at least 2 p.a.)

At least once every three months

5 – Preferred Board Feedback Dates (select 4 in order of preference)

- January (update the board on current employer contacts and update on targeted employers)
- May (update on status of targeted employers)
- September (reporting on C-Suite)
- November (update on additional targeted employers, 6 months review)

SUB COMMITTEE

Terms of Reference:

Young Analyst Award Committee

Effective Date:

November 2020

Purpose:

The purpose of this document is to establish the Terms of Reference for the **Young Analyst Award Committee**.

- To identify and award the top young analysts (under 30) in the annual Financial Mail “Ranking the Analyst” awards
- To support Intellidex (responsible for the survey and calculations to identify the winners) in establishing the suitable criteria for the awards categories
- To measure the effectiveness of this committee in delivering member value

Objectives:

- Assist Intellidex with defining the award categories and the submission criteria
- Recruit a group of volunteers to review and grade all submissions to the Young Analyst Award
- Identify the top three submissions in each category
- Promote the award and winners, and what it means in developing the skill set in the industry
- Survey stakeholders including asset managers on the usefulness in this award

2020 Measurable KPIs:

- Recruit at least 6 volunteers – with the support of the Volunteer Management Committee – to review the reports and identify the winners
- Successful awarding of winners in two categories
- Survey or engagement with Stakeholders on the merits of the award

Committee Structure & Operations:

1 – Chair

Jennifer Henry, CFA

2 – Committee Members

Thato Mashigo, CFA
Delphine Govender, CFA
Lwando Moni, CFA
Raazia Ganie, CFA
JD van Wyk, CFA

3 – Meeting Frequency (at least 2 p.a.)

At least once every quarter

4 – Preferred Board Feedback Dates (select 4 in order of preference)