



Delegate Selection Policy

In appointing delegates or representatives to external conferences, workshops or training sessions, the CFA executive will serve as the delegate/representative selection committee. If resources are available to fund additional delegates or representatives, then a call for nominations will be held at a regularly scheduled general meeting.

1. Delegate or Representative Selection

- a. First consideration will be given to CFA executive committee members.
- b. Second consideration will be given to appropriate CFA standing committee chairs or a member elected by that committee.
- c. Third consideration will be given to members nominated who have demonstrated a high level of involvement in the CFA.
- d. Forth consideration will be given to members nominated who stand to benefit most from attending the event.
- e. The committee will have at least one alternate candidate who is willing to attend on short notice in the event one of the selected candidates is unable to attend.
- f. Nominees who are not selected will have the option of being placed on a waiting list.

2. Delegate/Representative Expectations

- a. Delegates/representatives are expected to attend the full event unless prior arrangements have been made with the selection committee.
- b. Delegates/representatives may choose which workshops to attend based on their own interests and anticipated benefits to the CFA. Wherever possible, there should be a cross-section of workshops attended by delegates/representatives.
- c. When delegates/representatives attend an event where the CFA is expected to cast delegate votes, all those CFA delegates and representatives attending the event shall form the CFA caucus. The CFA caucus shall determine the way in which the delegate votes will be cast.
- d. Delegates/representatives may be required to provide a post-event report to the CFA at an executive meeting or general membership meeting following the event.

3. Expenses

The CFA will cover required substitution costs of replacement faculty needed to cover the delegates/representatives from their regular scheduled duties.

The CFA Expense Policy shall be followed for all other related expenses.

Approved by the CFA membership at its AGM on May 1, 2014.