



**LEADING TREASURY
PROFESSIONALS**

GUIDELINES FOR VOLUNTEERS SUPPORTING ACT TREASURY NETWORKS (UK AND INTERNATIONAL) AS AMBASSADORS AND/OR PANEL MEMBERS

Objective:

To develop and support the treasury community at local level through ACT Treasury Networks supported by local volunteers who act as advocates for the ACT

Volunteer's role will be to:

- raise awareness of the treasury profession and the ACT in the regions by promoting qualifications, membership, training and events
- advise the ACT team on how best to provide a first-rate service to members and students that delivers local, topical, relatively informal 'member-led' meetings and that complement the ACT's programme of events, webinars and other activities
- where possible, facilitate introductions to key employers, professional bodies, regulators etc. In particular, help identify those that may be interested in business membership or CPD employer accreditation or who would benefit from the ACT's support in developing their treasury or finance teams through qualifications, training etc
- be a key point of contact for members and students in local regions and to welcome new contacts

Each Treasury Network will be represented on the ACT's Membership Advisory Panel, the role of which is to provide advice to the ACT Executive team and so ensure we continue to add value for members and students across all levels and sectors and wherever they are located.

We appreciate that your support for the ACT Treasury Network is provided on a voluntary basis and that you have a day job. If, therefore, your situation changes, and you feel that you will not be able to spare the time to assist, please do let us know so we can look to find a replacement (even if temporarily) or additional support.

Representing the ACT

We understand that you may participate in conferences other than those organised by the ACT. We would ask that you speak at such events in a personal capacity or under the auspices of your own organisation and not in your capacity as an ACT volunteer without the ACT's prior approval, as it could be construed that the ACT is endorsing that event, which may well be in competition with the interests of the ACT. If in doubt, we are very happy to advise.

Social media

We ask Treasury Network volunteers to help promote the ACT wherever possible on social media channels including:

- listing your ACT qualifications/membership/ volunteer involvement on LinkedIn profiles where appropriate
- taking part in ACT social media discussion groups and topics where possible
- tweeting about ACT events.

Network activity (meetings/events)

The ACT team will work closely with treasury network volunteers and:

- will aim to produce 3 meetings per year per network. The default setting for these meetings will be informal gatherings for ACT members and students (non-members by specific invitation), facilitated by the network volunteer and with input on potential topics of discussion from the ACT team
- where an opportunity arises for a technical update meeting with a potential host and speaker, a career progression, diversity and inclusion event, or a joint event with another body or association then this can replace one or more of the informal gatherings. Non-members can attend these meetings, if appropriate
- given the higher numbers in London, we will arrange at least 3 events but with flexibility around format and will add more meetings if appropriate opportunities arise
- will report on the meetings afterwards to provide useful content for members by way of articles, blogs, social media etc.

Network volunteer responsibilities:

- provide insight on local market and treasury-relevant topics for the regions
- advise on any cultural/logistics issues
- suggest potential speakers and venues and liaise with the ACT before any commitment is made
- provide a venue where possible to host a network meeting or work with the ACT team, using local contacts to help find local venues
- support the ACT through attendance and involvement (e.g. speaking, facilitating etc) at relevant conferences and meetings. For UK-based representatives this would include attendance, if possible, at the ACT Annual Conference
- use any local contacts to promote attendance at Treasury Network meetings or other ACT events
- ensure any ACT updates or key messages are communicated at meetings
- make the audience aware of any ACT brochures or other material available at the meeting.

ACT responsibilities:

- provide value to all members through a programme of activities
- agree a schedule of dates for the year ahead even if no further details are available yet. Consult with volunteers to find topics highlighted by the members where this is not already being covered by the ACT's programme of events (including webinars)
- secure venues for network meetings. If necessary, ACT funds can be used to secure venues subject to budget
- suggest and agree topics and potential speakers with volunteers before anything is confirmed
- provide all administration for network activity, including:
 - keeping mailing lists for each region on the ACT central database. All new contacts made by the volunteer(s) should be sent to the ACT to be included on the master list
 - sending all communications to members (invitation, reminders, surveys)
 - all bookings should be made through the ACT website

- supplying attendee lists to the volunteer(s) and host venue for the purposes of facilitating the event. These details must not be used for the purpose of marketing the volunteer's personal business or that of her/his employer or used for any form of communication not connected to the running of the event. The volunteer(s) will be required to sign up to the ACT's Volunteer Data Protection Agreement
- where possible a member of the ACT team will attend meetings to meet and network with participants and, if appropriate, speak or join a panel.

Commercial team-led activity

The ACT will continue to explore opportunities for sponsored product, which may include regional-based events e.g. as part of a larger package offering. Sponsorship allows us to produce important member products free of charge or at a greatly reduced rate. This activity is also vital for the continued growth of the ACT and the money is invested back into improving the services for all members and students, increasing the visibility of the ACT and the vital work we do to advance the profession. It is important to protect the relationships we have with our sponsors in order to retain their support.

For this reason, Treasury Network meetings must not be used by any organisation to sell or promote their products or services. Banks and other financial service organisations and consultancies need to be considered carefully and discussed with the ACT team prior to any commitment.

Useful contacts

Caroline Stockmann, Chief Executive cstockmann@treasurers.org

Ria Robinson, Director of Membership and Governance rrobinson@treasurers.org

Zoe Norris, Head of Member Engagement znorris@treasurers.org

Louise Tatham, Head of Professional Development, ltatham@treasurers.org

ACT Events team

Vicki Greenwood, Director of Global Events, vgreenwood@treasurers.org

Sulamith Waldmeier, Live & Digital Content Producer – Global Events, swaldmeier@treasurers.org

Helena Silver, Global Events Co-ordinator, hsilver@treasurers.org