



**TREASURY
EXCELLENCE
AS STANDARD**

GUIDELINES FOR VOLUNTEERS SUPPORTING ACT TREASURY NETWORKS (UK AND INTERNATIONAL) AS AMBASSADORS

Objective:

Our members value the opportunity to build local relationships with other members and to raise the profile of the profession and membership within their region.

The treasury networks provide the opportunity for members to exchange ideas, hear about treasury initiatives, understand how the ACT can support them and network. The networks are run by regional treasury network ambassadors who act as advocates for the ACT. The ambassadors are supported by the ACT membership team.

What being a treasury network ambassador means for you:

- as a treasury network ambassador, you will be the face for the ACT within your local treasury community. This is a great way to raise your profile, and to promote understanding of treasury and the ACT's qualifications, membership, training and events
- it will provide you with opportunities to exchange views and experiences with fellow members, thereby developing your personal and professional networks. You will be able to help deliver local, topical meetings on areas that are most relevant to those in your local community
- as an ambassador for the ACT, you will support the ACT in identifying key employers, professional bodies and other external stakeholders who may be interested in working with the ACT or who would benefit from the ACT's support in developing their treasury or finance teams
- the ACT Membership Advisory Panel meet four times a year, and one of these meetings focuses on treasury networks and how to build awareness and engagement in key areas. At least one treasury network ambassador from each network is expected to attend this meeting.

We appreciate that your support for the ACT is provided on a voluntary basis and that you have a day job. We would advise that there are two to three ambassadors per region to enable you to share the responsibilities. If, at any point, 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.

Network activity (meetings/events)

Treasury network ambassadors will:

- aim to run at least two meetings per year per network for ACT members and students (and for regions outside of London non-member contacts of the ACT that have opted into the relevant mailing list for the regions)
- decide on the topic to discuss, find the speakers and secure a venue for hosting the event. The host will need to cover the costs for the event, including refreshment costs

- Ensure these meetings are social networking events, informal topical discussions or a mixture of both
- provide an update on attendees after the event and where possible, provide content for members by way of articles, blogs, social media etc. as appropriate.
- Help to publicise any events to own network/contacts and on social media accounts such as LinkedIn where appropriate
- All new contacts made by the ambassador(s) that wish to be added to the mailing list should be sent to the ACT team
- For any emails communications sent out by the ambassador on behalf of the ACT a footer needs to be included which provides the unsubscribe option. This footer will be provided to all ambassadors by the ACT team.

Prior to any meeting, the treasury network ambassador will:

- liaise with the ACT before any commitment is made on speakers, venues, dates and hosts so that we have time to plan around any other ACT activities and avoid any potential conflicts with sponsored ACT activity. The ambassador will aim to provide the ACT with 8 weeks' notice so that the ACT can book emails and help with communicating the event to members
- advise on any cultural/logistics issues such as clashes on dates with local holidays, large sporting events etc.
- 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
- promote attendance at treasury network meetings or other ACT events using local networks.
- ensure any ACT updates or key messages are communicated at meetings
- make the audience aware of any ACT promotional material available at the meeting.

ACT responsibilities:

- liaise with network ambassadors to ensure we 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
- provide administration support for network activity, including:
 - keeping mailing lists for each region on the ACT central database
 - sending communications to members (invitation, reminders, surveys)
 - supplying attendee lists to the ambassador(s) and host venue for the purposes of facilitating the event. These details must not be used for the purpose of marketing the ambassador or host'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 ambassador(s) will be required to sign up to the ACT's Volunteer Data Protection Agreement
 - from time to time a member of the ACT team may attend meetings to meet and network with participants and, if appropriate, speak or join a panel.

Social media

We ask treasury network ambassadors to help promote the ACT wherever possible on social media channels including:

- listing your ACT qualifications/membership/volunteer involvement and digital credentials on LinkedIn profiles where appropriate
- taking part in ACT social media discussion groups and discussions where possible
- sharing ACT social posts promoting our events, products and services.

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.

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.

Useful contacts

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ACT Events team

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