Personal Finance Society

Standards. Professionalism. Trust.

Regional Impact

A GUIDE TO COMMITTEE SUCCESS

Collaboration | Commitment | Community

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A Little Note.

Here at the PFS we would like to extend our sincere gratitude to you for your invaluable contribution as a regional volunteer and committee member. Your dedication and hard work play a pivotal role in shaping the future of personal finance within our community.

Your commitment is very much valued and we are truly grateful for the effort you invest in driving positive change. It is your feedback and insights that shape the direction we take, and we recognise the significance of your role in these developments.

In light of recent developments, we understand that questions may arise. This guide has been curated to address any queries that may have surfaced, providing clarity and support as we collectively navigate the exciting path ahead. As always, if you have any further questions or need additional support please reach out to us.

Once again, thank you for being an essential part of our regional team. Your passion and contribution are instrumental in our shared mission for a brighter future in personal finance.

Meet the

Member Engagement and Partnerships Team.

Shelley O'Rourke

Regional Membership Executive

Alison Tilzey

Regional Membership Manager

Vilma Marques

Education Programme Executive

George Tsounias

Education Programme Manager

Daniel Moodliar

Professional Development Co-ordinator

Sophia Awan

Programme Development & Partnership Manager

Mark Hutchinson

Membership Director

Past to Present: Background and the Vision for 2024.

The Background

The PFS are the leading professional body for the financial planning sector, with an impressive membership of nearly 40,000 individuals. 75% of which are financial planners and a quarter of the membership are professionals in roles such as Paraplanning, Compliance, Back Office and Business Owners. Operating across the United Kingdom, the PFS is organised into 26 distinct regions, each overseen by its dedicated committee. These committees are essential in maintaining the future growth and professional standing of the society, providing access to career support and personal development opportunities at a regional level.

In reflecting on the past approach to PFS CPD and Regional Member Engagement, the PFS had arranged a centralised design and delivered this content across the country. PFS regions have played a vital role in hosting full-day events, three times a year. There have been some specialised events, however not always tailored to regions. Our previous model was predominantly supported by sponsorship, with the same content replicated around the regions. We have seen an overall growth in regional member engagement hence the need for more tailored content at a regional level.

Recognising the evolving landscape and the imperative for change, several drivers have surfaced. The necessity for PFS to foster a greater role and strive for engagement and improve our diversity within the industry starting at a local level. A decline in sponsorship commitment, in terms of the volume of events and an increase in demand and engagement for centralised digital content, prompted a reassessment of our strategy.

The requirement for a strategic shift has arisen from the request to deliver authentic localised professional networks. We have seen an increasing representation of PFS members on Local Institutes which calls for further collaboration. As we navigate these drivers for change, the aim is to redefine our approach, ensuring meaningful local engagement, supporting volunteers and delivering true value to our membership.

Key Takeaways

Previous PFS CPD & Regional Member Engagement:

- Centralised design & delivery
- PFS regions hosted
- Full day events, all regions, 3 times a year
- Majority sponsorship funded
- Additional specialised events (not regionally aligned)
- Growing regional member engagement

Drivers for change:

- Need for PFS to deliver greater role and diversity engagement
- Perceived sponsorship influence on content
- Declining sponsorship commitment (volume of events)
- Greater central digital content / engagement
- PFS volunteer local engagement & capability
- Growing PFS member representation on LIIs
- Need to deliver true localised professional networks

Member Research

- 70% of members surveyed, were happy to travel outside of their PFS region for quality, relevant events.
- The quality and relevance of speakers and sessions was the most important driver to satisfaction.
- Travel time and travel cost were of low importance to members when deciding to attend an event.
- Quarterly events are still considered optimum frequency.
- A mix of small, local events, as well as larger events were preferred, with different requirements for them both.
- Masterclasses and in-depth sessions were most valued and requested, alongside sessions specific to roles and career development.
- There was feeling that the events were solely for experienced advisers and 'elite' which affected more member engagement.
- The perception of provider involvement was a key driver for new members not engaging with the programme.

Vision for 2024.

PFS Xchange

PFS Xchange signifies a paradigm shift in our approach to CPD. This innovative new program aims to streamline CPD offerings with a focus on offering fresh content, skill improvement, technical masterclasses and customer focus for our different segments of the membership. By securing greater central funding, we have reduced our reliance on sponsors, giving us a greater command on our content. This allows us to maintain a balanced mix of technical and skills-based forums, catering not only to adviser roles but also encompassing a broader professional spectrum.

One of the key strengths of PFS Xchange lies in its ability to complement the centralised digital program. Together, these initiatives create a cohesive learning experience, ensuring that our members receive comprehensive, varied, and high-quality CPD opportunities.

Core centralised CPD programme – 'PFS Xchange'

- Centralised CPD event design & delivery
- Larger, multi-streamed events offering a greater choice of content
- Less reliance on sponsors (greater central funding)
- Balanced technical and skills content
- Including all segments of the membership
- Complementing centralised digital programme

PFS Local

The PFS is introducing a transformative approach, replacing the traditional regional roadshow events – PFS Local. This initiative envisions regional volunteer committees actively contributing to the creation of professional local communities to provide robust support for members. This could include the likes of a face-to-face breakfast CPD event, networking events, in person revision sessions, workshops for smaller group focussed learning and discussion or skills focussed sessions, to help all roles support clients better such as communication skills or how to deal with vulnerable clients in a digital world.

Unlike past endeavors, PFS Local is not about replicating previous PFS events but emphasises locally organised events, fostering genuine community engagement. Regional committees will take ownership of content and event delivery, offering a more meaningful role in shaping member experiences.

The Regional Managers will support the regional committees in their plans. Each region will receive £10,000 in central funding to facilitate the successful implementation of PFS Local, marking a significant step towards building dynamic and practitioner-driven local communities.

True local community engagement – 'PFS Local'

- Regional committee owned & delivered content / events
- More meaningful role
- Centralise planning, marketing & KPI support
- £10k per region central funding

Events Calendar 2024.

Please check https://www.thepfs.org/events/ for further updates

Spring Xchange : Later Life Planning Conundrums

Tuesday 27 February – London
etc Venues 155 Bishopsgate

Thursday 29 February – Southampton
Hilton Ageas Bowl

Tuesday 12 March – Glasgow
Crowne Plaza Glasgow

Thursday 14 March – Manchester
Old Trafford, Manchester United Football Club

Summer Xchange : AI and Tech

Wednesday 5 June – Belfast
Kingfisher Country Estate

Tuesday 11 June – Leicester
King Power Stadium, Leicester City Football Club

Thursday 13 June – Durham
Ramside Hall Hotel

Tuesday 25 June – Bristol
Ashton Gate, Bristol City Football Club

Thursday 27 June – Epsom
Epsom Racecourse

Autumn Xchange : Talking Tax

Tuesday 10 September – Leeds
Headingley Stadium

Thursday 12 September – Liverpool
Titanic Hotel and Rum Warehouse

Tuesday 24 September – Birmingham
The National Conference Centre

Thursday 26 September – London
Leonardo St Paul's

Future Vision 2024 : Adapting to Tomorrow's Advisor Landscape.

Wednesday 17 January - London
America Square Conference Centre

Purely Paraplanning : Thriving in a Changing Landscape.

Wednesday 8 May – London
etc Venues St Paul's

National Conference.

Tuesday 12 November - Manchester
Manchester Central

Officers' Conference.

June

Date and Location
To Be Confirmed Shortly

Quick Wins.

PFS Improvements

- **National Conference:**

- Digital sessions available on demand – PFS National Conference
- View speaker presentations – Presentations

- **PFS Radio (podcasts):** PFS Radio

Recent episodes include:

- Deconstructing disability
- The value of professional designations
- National Conference highlights

- **PFP magazine:** Winter issue – PFP Winter 2023

PFS Local Examples

Committee: Central Scotland
Name of Partner: Rathbones
Format: Face to Face Event/Breakfast Meeting
Duration: One Hour

Description: The popular topic of Stewardship and Responsible Investments has been discussed with the local Central Scotland committee. The committee have organised a specialist technical speaker to deliver a presentation on – Challenges and opportunities in 2024. The cities of Glasgow and Edinburgh have been selected with the committee members hosting the breakfast event in their boardroom. The invitation and direct mailer will be designed by the Regional Membership Manager and the invitations will be sent to all PFS members in Central Scotland.

Personal Finance Society

Committee: Lancashire, Merseyside and Cumbria
Name of Partner: Bank of England
Format: Webinar
Duration: One Hour

Description: The 4 part series on the Monetary Policy Report, throughout 2024 presented by the regional deputy agent at the Bank of England has been confirmed by the Lancashire, Merseyside and Cumbria regional committee. The detailed presentation will be well received by all members with the opportunity of a Q&A session after the presentation. The date and time is confirmed for all parties and support from the Regional Membership Manager to organise the invitation and direct mailer.

Committee: Central Scotland
Name of Partner: Foresight Group
Format: Webinar
Duration: One Hour

Description: The Central Scotland Committee contacted The Foresight Group in regards to presenting a webinar on business relief. The content was discussed and agreed including a Q&A for members at the end of the presentation. The date and time was confirmed for all parties. The Regional Membership Manager supported the webinar by setting up the webinar using the ON24 platform and creating the invitation which was sent to all members in the Central Scotland region.

PFS Volunteer Questions.

1. Is the purpose of the new strategy for Regions to deliver Regional Conferences that will not now be organised and delivered centrally?

No, we are not asking our regional committees to organise the old-style regional events. A new format centralised programme will replace those. Our vision is that our regional volunteer committees will support us in building practitioner-led local communities to support members - PFS Local.

2. Do we have to arrange our own AV and will this need to be covered by the £10,000?

We will support the delivery localised events in whatever format is appropriate. Smaller, local events are unlikely to need outsourced AV and stage sets, but your regional membership manager will advise. Should you need AV, this cost will be used from your regional budget.

3. Will the stage set up be provided to us?

The style of the event will dictate what staging and branding is necessary, if at all. Pull-up banners or even a branded PowerPoint template may suffice. Your regional membership manager will work with you to plan the most appropriate solution.

4. Will we have to use our own laptops, or will one be provided centrally?

We will provide the resources you need to be able to deliver the style of event that is appropriate to the venue and audience, in a professional way.

5. How can we communicate with the members in our region? Will we have access to member data?

Your regional membership manager will support you with member data and communications from the central CRM. Committees that have relationships with Local Institutes will also be able to access data and send communications using the eflyer system.

6. Can we have an update on the centralised training programme?

If committees want to provide members in their region with exam revision support, there are various options. The experience central team will be happy to support the design and delivery of structured revision programmes. This can involve continuing with existing trainer relationships. Your regional membership manager will help coordinate this.

7. Is there a centralised speaker list we can pull from?

There are numerous options for sourcing speakers, including existing relationships, local employers and independent professionals, centralised PFS contacts, Insurance Institute contacts and specialist agencies. Once the event and / or topic is scoped, your regional membership manager will support with the sourcing, due diligence and contracting (if necessary) of appropriate speakers / subject matter specialists.

8. Is there a list of recommended venues that we can have access to?

It is anticipated that smaller local venues will be appropriate, depending on the event style, size and format. Local employers may support with space and a variety of community-based options exist. If larger venues are required your regional membership manager will coordinate sourcing an appropriate venue and pull in the resource of the central events team if appropriate.

9. The PFS receive discounts at some of the venues we've used for events – will we have access to the same discounts and how can we obtain them?

It is not anticipated that large venues will be required on a regular basis. We will support committees in sourcing venues that are appropriate for the type, style and size of the event being planned.

10. Can we have more information on the centralised support to help us deliver a local proposition?

Your regional membership manager will be your primary point of contact and they will draw from the wider resources of the PFS / CII Group as necessary. They will help you take a seed of an idea and turn it into a comprehensive fully scoped plan for delivery.

11. Registration at local events, will PFS be assisting with this?

If registration is required for the type / style of event then your regional membership manager will support you.

12. How much notice do we need to give the PFS to assist in organising a local event?

Your regional membership manager will be supporting you in creating a plan for your region, which will be where you start thinking about what, when and where you want to deliver. For events to be successful members need to be given plenty of notice and we'd suggest a minimum of six-eight week. From an initial idea it is likely to take eight to twelve weeks, but depends on the size, style, type and location of the event.
Once local community engagement is higher these timescales may come down significantly.

13. Can local events be booked online through the PFS Website?

We have various options depending on the type and size of event, from Eventbrite to ON24. Your regional membership manager will support you in marketing the event and facilitating registrations.

14. How do we market/promote local events?

Your regional membership manager will support your region with the organisation and marketing of all regional activities to support members. Working together with your Local Institute will also enable additional support.

15. Will Local Institutes still receive funding for PFS members and if yes, can we access this funding on top of the £10,000. If yes, can we combine the funds to run events?

Yes, there is no change to the way Local Institutes are funded, so collaborating is a great way to access the resources at their disposal. The direct funding for PFS regional committees is designed to enable activities whilst you are forging relationships and is on top of any funding provided by Local Institutes.

16. If we want to run more events, can we apply for additional funding?

We will consider requests for additional funding on a case by case basis. Again, collaborating with Local Institutes may enable additional funding.

17. Can we organise webinars or do events have to be face-to-face?

The central team run a programme of webinars, which includes a comprehensive POWER programme of financial planning skills. We would expect PFS Local activities to be weighted towards face-to-face to engage members locally, but webinars may well have a place as part of a well-balanced local programme.

18. Regions have previously had a £250 annual allowance to support catering for committee planning meetings – is this still available on top of the £10k?

Yes – the £250 allowance is on top of the £10K.

19. What can we spend the £10,000 annual funding on?

The budget is to enable our regional committees to organise and deliver activities that add value for members locally and drive member engagement. Your regional membership manager will support you through the initial planning stages, setting KPIs and on to delivery. As with all centrally developed and delivered activities there must be an audit trail of value creation to support members as part of the overall membership proposition.
The funding is for the 2024 calendar year and any unspent funds will not accumulate beyond year end.

20. Will there be a social media workshop to help those of us who are unfamiliar help us get started?

Yes, training can be organised to support you in your voluntary roles and your regional membership managers will coordinate such activity.
NB. Social media is extremely resource intensive, both to build and maintain audience engagement. It can add considerable value but is a significant commitment.

21. Roles will be changing considerably from the last few years, what will we actually be doing now for the individual volunteer roles?

We have updated the roles and responsibilities document on each role concentrating on local engagement and connections with Local Institutes.

22. CPD Certificates – who will provide these for the local events?

When organising your own face to face regional CPD events, the regional committee will note the attendees, the Regional Manager will then send the updated CPD certificate to your attendees. For webinars held on ON24, ON24 automatically generates CPD certificates.

Regional Committee Proposition and Volunteer Roles.

Each of the committees should strive to connect with local members, foster a community spirit, facilitate learning tailored to local requirements (e.g. engagement, CPD, etc.) and offer value to local members. Various approaches, whether through physical or digital events can accomplish this. Your PFS regional manager is available to assist with any initiatives. The Committee Progression Planner offers additional detailed suggestions and you'll find some suggested ideas later in the guide.

Volunteer Roles.

Regional Chair

The Regional Chair will be an ambitious and driven figurehead for the Regional Committee members and should act as an ambassador for the society. As well as being the Principle Regional host of the Regional Committee, the Chair should be able to provide direction and leadership to the committee members and Personal Finance Society members. An advised three-year term post with overall responsibility for coordinating regional communications and activities. Chairs can be re-elected on an annual basis to a maximum of three years; this can be extended at the discretion of the committee if there is no successor.

Main duties include:

- The Chair will be supported in their role to ensure they are up-to-date and knowledgeable on Personal Finance Society activities via the website and through regular communications from Central Office.
- Organise a planning meeting with the committee to discuss the objectives for 2024 and outline the plans for local engagement with face to face events and webinars.
- Be an advocate of the Personal Finance Society.
- Communicate appropriate information to committee members and attendees at regional conferences.
- Facilitate at least four committee meeting per year either face-to-face or virtual.
- Feed back comments and suggestions from members to the RMM.
- Ensure that at least one committee member is aligned with each Local Institute within the region.
- Ensure committee members are engaged and delivering as per roles and expectations.
- Succession planning – The Chair roles should be a maximum three-year term. The Chair should be preparing for their successor to take over.

Professional Qualifications Officer

The Professional Qualifications Officer will be passionate about developing the training needs and competency of members. Assisting in the Continuous Professional Development of the regional membership. This will largely be achieved by assessing member requirements, hosting additional regional events and having oversight of Local Institute events that might be relevant to Personal Finance Society members.
An advised three-year term post focused on maximising the development, training and competency of members. The post-holder will need to be familiar with CII study, tutorial and examination facilities and will advocate professional development. Professional Qualifications Officers can be re-elected on an annual basis to a maximum of three years.

Main duties include:

- Promotion of qualification framework via local engagement and social media channels.
- Organisation at least one additional CPD event or activity per year either locally or in conjunction with neighbouring regions.
- Key contact person for local members on queries relating to CPD, training and qualification framework.
- Encourage members locally to pursue additional qualifications / develop CPD.
- Provide revision session for local members undertaking examinations.
- Support Chair and other committee members at face to face events or virtual events where possible
- Support (and encourage others to support) the local written examination centres in conjunction with neighbouring local institutes.
- Be aware of any Local Institute events that are available and relevant to Personal Finance Society members.

Membership Officer

The Membership Officer will be an outgoing and enthusiastic Regional Committee member who will be passionate about encouraging greater member participation in both local and regional conferences and activities, together with the recruitment of new members and retention of existing ones. An advised three-year term. Membership officers can be re-elected on an annual basis to a maximum of three years.

Main duties:

- Promotion of membership proposition via speaking slot at local conferences, onsite engagement and social media channels.
- Engage with guests and non-members at conferences primarily via meet and greets during refreshment breaks in order to advocate professional body membership.
- Organisation at least one additional event or activity per year either locally or in conjunction with neighbouring regions – possibly social /soft-skill
- Seek ways of encouraging member and non-member attendance at conferences including the provision of material for regional communications to be sent via Central Office and social media channels.
- Post-event follow-up with non-members in line with membership strategy.
- Support Chair and other committee members at physical or virtual events where possible.
- Promotion of the Personal Finance Society app
- Develop new ways of promoting the benefits of Personal Finance Society membership to non-members
- Explore ways of promoting and generating wider interest in the Personal Finance Society in the business community via local press, radio, social events.

New Professional's Officer

The New Professional's Officer will be an energetic and enthusiastic person who is passionate about encouraging the engagement of the younger and new members of the profession by raising awareness of the Personal Finance Society proposition. An advised three-year term post.

Definition of New Profession: Less than 10 years in the profession (not generally age related)

Main duties:

- Promotion of Personal Finance Society proposition to new and younger members of the profession via PFS conferences and social media.
- Encourage attendance to regional conferences.
- Organising at least one event per year for New Professionals locally or in conjunction with neighbouring regions and local institutes.
- Explore ways of promoting and generating wider interest in the Personal Finance Society amongst new and younger professionals.
- Speaking slot at regional conference when applicable.
- Support Chair and other committee members at physical or virtual events where possible.

Education Outreach Ambassador

The Education Outreach Ambassador is an ambitious and enthusiastic Regional Committee member who raises the profile of the My Personal Finance Skills initiative with schools and members.

Main duties include:

- Running a series of sessions to local schools throughout the year (financial education sessions).
- Raising awareness of the programme, gaining support of its work and promoting initiatives via a personal network of contacts.
- Promoting the programme to local schools to increase school engagement for local Education Champions.

For more detailed information regarding this role, please contact Education Programme Manager at the PFS, George Tsounias, by emailing george.tsounias@cii.co.uk

Social Media Manager

The Social Media Manager is a creative and dedicated individual with a strong understanding of social media dynamics, excellent communication skills, and a passion for promoting the committee's initiatives. The Social Media Manager will contribute significantly to the committee's visibility and impact in the community by driving their online presence and promoting the objectives and activities of the committee through your chosen social media platforms. This role is key in enhancing engagement, building local awareness and fostering a sense of community.

Main duties include:

- Develop and implement a comprehensive social media strategy aligned with the committee's goals and initiatives.
- Create engaging and relevant content for various social media channels, including posts, graphics, and multimedia materials.
- Act as a passionate advocate for the committee's mission and values, ensuring that all social media content reflects the committee's identity and goals.
- Foster active engagement with the audience. Actively engage in community building by connecting with followers and relevant organisations to effectively expand the committee's network.
- Effectively promote committee events, initiatives, and campaigns across social media channels, maximising reach and participation
- Coordinate efforts with the Regional Manager other committee members to align social media activities with broader regional goals.

Chartered Champion

The Chartered Champion will be passionate and committed to promoting Chartered status and providing assistance and guidance on the 'Road to Chartered'. The Chartered Champion will be a focal point for the benefit of Chartered status within the regional and will be called on to host Chartered events.

Main duties include:

- To be the local Personal Finance Society advocate for Chartered status in their region.
- Promotion of chartered proposition – via Ongoing engagement with chartered members at conferences, speaking slot at regional conference and social media.
- Representing the Personal Finance Society and acting as host at a variety of events organised centrally specifically for Chartered Financial Planners.
- To arrange at least one Chartered Connections event per year in association with local professional firms – legal and accountancy firms – for education and networking.
- To be proactive in promoting and raising awareness of the Chartered brand to the public through engagement with local press, social media, radio and local community events.
- Support Chair and other committee members at physical or virtual events where possible.

SMP Advocate

The SMP Advocate will be committed to the raising of standards and passionate about demonstrating professionalism within the Mortgage sector. They will be a focal point for the benefits of SMP membership, Associate Firm status, and Mortgage Related qualifications and will be called on to support with regional Mortgage events.

Main duties include:

- To be the local Society of Mortgage Professionals advocate for members and Associate Firm status in their region.
- Promotion of mortgage proposition – via Ongoing engagement with SMP members at SMP events.
- Representing the Society of Mortgage Professionals and acting as host at a variety of events (face to face or virtual) organised centrally specifically for Mortgage Advisers.
- Attend virtual catch-up meetings with SMP National Account team to share experiences and ideas with the board.
- To arrange Mortgage Connections events in association with local professional firms – legal and accountancy firms – for education and networking.
- To be proactive in promoting and raising awareness of the SMP brand to the public through engagement with social media, local press, radio and local community events.

Data and Mailing.

Your regional membership manager will support you with member data and communications from the central CRM. Committees that have relationships with Local Institutes will also be able to access data and send communications using the eflyer system.

There are several ways regions can engage with members, the PFS are happy to facilitate monthly communication with your region. If regions would prefer to send newsletters less frequently, such a quarterly or skipping a newsletter due to less upcoming activity, this should be communicated to your regional manager.

To populate these newsletters, all content should be shared with your PFS manager, a week before the newsletter is due to be sent. A newsletter schedule for the year ahead will be provided to all regions and these can be tweaked to such each region's needs.

If regional committees work closely with their local institute, they can also send communications via the data that institutes hold.

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Fund Guidelines.

Guidance

When managing the £10,000 budget for your regional volunteer committee, please use reasonable judgement and consider these guidelines, if in doubt please ask your Regional Manager.

Budget Approval

Prior to any spending please inform your Regional manager so they can create the purchase orders.

1. **Objective Alignment:** Ensure expenditures align with the committee's mission or goals.

2. **Prioritise Needs:** Identify essential needs first before allocating funds to wants or extras.

3. **Transparent Budgeting:** Maintain a clear, detailed budget to track and justify all expenses.

4. **Quotes:** Seek multiple quotes for significant purchases to ensure cost-effectiveness.

5. **Emergency Fund:** Allocate a portion for unforeseen circumstances or emergencies to avoid budget shortfalls.

6. **Inclusivity:** Strive for fair distribution of funds across different aspects of the committee's responsibilities.

7. **Documentation:** Keep thorough records of all transactions, receipts, and approvals for accountability.

8. **Community Impact**: Consider how each expenditure contributes to the community or the committee's objectives.

9. **Future Planning:** Assess the long-term impact of spending decisions and plan accordingly.

10. **Review and Adjust**: Regularly review the budget to make adjustments based on changing needs or unexpected developments.

11. **Speakers:** If not using local speakers please check with your regional manager to see if we have an agreement or package already in place.

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Financial Process.

How To Have Invoices Paid And Access Funding

Each PFS committee will have access to £10,000 funding per annum, starting from January 2024. This funding should be used to engage and provide value to PFS members in their region, throughout the year.

The PFS will hold this funding and facilitate all payments on behalf of the regional committee. We'd ask committee members to please follow the process below, to utilise their funding.

- Receive a quote for the activity and share this with your PFS regional manager.
- Your regional manager will raise a purchase order (PO) for the activity and provide you with a PO number.
- Once you're in receipt of the PO number, you can proceed to book or commit to the activity, this spend is now formally approved.
- Once the activity has taken place, all suppliers need to invoice the PFS directly, quoting the PO number provided earlier. The PO document will provide suppliers with all the necessary details to invoice the PFS.
- The PFS will then process the invoice for payment, based on standard payment terms of 28 days from approval. The PFS payment runs take place weekly on a Tuesday, reaching the suppliers account by the Friday. Remittance advice is sent out to suppliers via email, once payment has been processed.

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Committee Event Planner.

Action (Suggestions 1-5 provided by PFS)	Plan for 2024	Current Progress	Date Completed	Learnings, Feedback & Statistics	Guidance And Considerations
1. A member engagement event, to provide a sense of local community.		Date: Progress:			This could provide CPD for members or could focus on networking in your local area. This could be delivered alongside a business in your area, who may be able to provide a venue or specialist speaker. This could take place virtually or in-person.
2. An engagement activity with regional Chartered members		Date: Progress:			An opportunity to bring together chartered members and provide that extra value to this membership category. This could be a webinar or face to face breakfast event, where you provide an expert speaker and promote high level discussion between chartered members.
3. Chair to manage committee composition, such as turnover of committee members, new recruitment, and succession planning, as necessary.		Date: Progress:			Is their good rotation of roles, for the benefit of all? Is there a robust succession plan in place for the chair role? Is there fresh perspectives and ideas from new committee members? Are most committee roles filled, what more can be done to ensure this?
4. Engagement with a particular membership segment.		Date: Progress:			This activity could be virtual or in-person but should focus on a particular segment of the membership, which could be; new members, female members, individuals who're in a particular age bracket, members who studying for a particular exam.
5. Organise and attend regular committee meetings to plan and further local member engagement.		Date: Progress:			Are committee meetings planned and do they successfully take place? Are these meetings well attended? Are the committee all aware of progress and continually working together to achieve the yearly plan?
6. Representation on or relationship building with local Institute council for cohesive local member engagement		Date: Progress:			Do you have any relationship with the LI? Is this something you wish to explore, for the benefit of the PFS membership? If you are engaged, what positives have come from this, in 2024?
7. Individual committees to populate		Date: Progress:			
8. Individual committees to populate		Date: Progress:			
9. Individual committees to populate		Date: Progress:			
10. Individual committees to populate		Date: Progress:			

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Engage and Evolve: Inspiring Ideas to Get You Started.

We encourage regional committees to deliver events that meet local member needs, the aims of an event will naturally suit a different format. These could include:

- CPD Webinars, a face-to-face breakfast or conference
- Networking events
- Workshops for smaller group focussed learning and discussion
- Skills focussed sessions, to help all roles support clients better such as communication skills or how to deal with vulnerable clients in a digital world
- Sessions focussed on developing personal skills such as 'building confidence and your emotional state' and 'how to develop and demonstrate credibility'

If you're struggling for inspiration on topics, you could look at the type of events that your local institute are running; https://www.cii.co.uk/membership/local-institutes/.

You could also ask local members what engagement and activity they would value. This could be done as a poll via social media platforms or included in your regional e-newsletter.

Here are some of the ideas that you suggested:

1. Interactive Workshops
2. Finance and Food Fiesta
3. Case Study Competition
4. Speed Networking Mixer
5. Young - ish Professionals
6. Axe throwing
7. Break the bank Escape Room
8. Speaker Series
9. Finance and Comedy Night
10. Wine Tasting
11. Financial Fitness and Wellbeing
12. Skill Building Workshops
13. Panel Discussions
14. Themed Roundtable Discussion
15. Lunch and Learns

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Digital Marketing.

Social Media

Please refer to the Regional Committee Social Media Guidance document, if you do not have this please ask your Regional Manager. Points to consider include:

1. Define the purpose and objectives of regional social media activities.
2. Evaluate the suitability of these initiatives for your region, this may be more appropriate for some regions than others for connecting with members at a local level via social media.
3. Explore the setup of regional PFS Instagram accounts, etc.
4. Seek assistance from regional managers in implementing these strategies.
5. Consider masterclass suggestions for social media engagement.
6. Prioritise consistency in social media efforts.
7. Weigh the digital versus local impact of social media strategies.
8. Continuously assess whether these efforts align with the goals and character of the local community.

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Content Strategy.

→ Define Committee Goals and Purpose

→ Create a Content Calendar

→ Know Your Target Audience

→ Produce Quality Content

→ Keywords Research

→ Distribute Content

→ Choose Content Types

Partners.

This could be an opportunity to work with local partners. When it comes to events a ‘partner’ could be a local firm of accountants, a chamber of commerce etc.
Partners can only support regions on a maximum of 2 face to face events in the North and South a year. They can participate in regional webinars.

Successful partnerships should be mutually beneficial.

Committee’s should have shared objectives and a clear understanding of what they want to achieve with their Partner. Partners are not allowed to arrange a sales pitch with members.

Partners often collaborate on marketing initiatives such as joint advertising campaigns.

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Run A Local Event.

How to run a local engagement event

Here is a guide to help PFS regional committees, with running a face-to-face local event. Please use this to help inform your thinking and prompt you to consider different aspects of the planning process.

Remember that your regional membership manager is available to support you through this process, so please do keep them informed throughout.

1. Decide on the who, what and why of the event

- Who is the event for? It could be for PFS members, chartered members, advisers who're newly qualified, paraplanners or female members.
- What type of event do you want to run? What is the theme & focus, is it a conference or a breakfast, what duration is most suited?
- Why are you running the event? Is it to provide CPD content, engage and encourage local members to network?

2. Decide on a date, agenda & speakers

- The date may need to be flexible at this point, until you've secured a venue.
- How long do you want the event to be and how will it be split into different sessions?
- Be sure to consider factoring in refreshment breaks as necessary.
- Consider how long is optimum for each speaker, to cover the necessary topic.
- Do you want to allow specific time for Q&A or additional networking?

3. Find a venue and secure the date & rooms needed

- Consider how many people will be attending the event, so you know the room capacity?
- Will you need a separate area for catering?
- Will you require any breakout areas or just one main room?
- What AV will be required? A hotel would normally provide a screen & projector which a laptop can be plugged into, to display slides.

4. Set up a registration site to collate bookings with your Regional Manager

- Your Regional Manager will set up your event on Eventsbrite.
- Ensure there is a maximum capacity on the bookings, so you have enough space at the venue for the number of attendees.
- Please ensure you add a terms & conditions box onto your registration page, to ensure you're covered with GDPR. Your regional membership manager will be happy to check this over for you, before it's sent out to members.
- We'd recommend allowing over-booking the event by 5-10% to allow for dropouts or no-shows.
- Eventbrite allows you to create an order form to collect delegate information, be sure to consider all the information you may need. If you're providing food, you'll need to ask for any dietary requirements. We'd recommend asking delegates if they have any additional requirements which you should be aware of.
- As soon as your registration page is set-up please share this with your regional membership manager, so this can be marketed to the membership via your local newsletter.
- We'd also recommend committee members sharing the link on their social media pages, to spread the word.

5. Final on-the-day preparations – brief speakers, share final numbers with the venue, send a reminder email to the delegates.

- You may want to send a reminder email to delegates a week before the event to provide venue information, parking or transport details, timings etc. This also is an opportunity for anyone who can no longer make it, to let you know ahead of the event day.
- It's worth checking in with speakers, to ensure they have all the information they need and slides have been shared with you.
- the venue would normally have a deadline for when they need final catering numbers which is normally a week or a few days before (this final number will be the figure on the event invoice) and we'd recommend you allow for a 5-10% drop out of attendees.
- You may wish to think about printing any collateral you need for the day, which could be a copy of the delegate list or some badges to allow for networking. For small events, badges can be handwritten or printed on pages on sticky labels – templates for these are available on Microsoft word.
- Consider putting a contingency plan in place, in case a speaker is late or unwell. This could be a recording of their session that could be played or asking them to have a back-up speaker who could stand in for them.

6. Event Day

- We recommend you arrive early and meet your venue contact to run through and re-confirm all details for the event. Ensure you're aware of where the nearest toilets are, any parking arrangements, how delegates with dietaries make themselves known to staff, wi-fi access codes and any other questions you may get asked by delegates.
- If required, set up your registration desk so you're ready for delegates to arrive.
- Check the AV equipment you're using, test slides and ensure you're comfortable with how it works. The venue can help with this if you're having any issues.
- We'd recommend being ready to go and having completed the above at least 30 minutes before delegates are due to arrive.

7. Wrap-up the event

- Ensure all invoices are in and processed for payment
- You may want to consider sending a 'thank you for attending' email to delegates, this could also include the slides from the event or any suggested follow up actions.
- Be sure to share your success, we'd love to hear about how many members you engaged with and all the good feedback received, so please do share this information with your regional membership manager.
- Try to collate feedback on how the event went, this could be from delegate conversations on the day or personal reflection on the organisation process. Keeping a record of this, can be useful to help you with running future events.

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CPD.

Continuing Professional Development (CPD) is activity undertaken to ensure your skills and knowledge are up-to-date. CPD is a common requirement for qualified members of professional bodies. It reflects the fact that, in today's fast changing world, knowledge gained through qualifications quickly dates and, if you are to remain competent, you must continue to develop and enhance your knowledge.

CPD helps ensure that, as a qualified member, you have the knowledge and skills necessary to succeed in a competitive market. It helps:

- Build public confidence and credibility
- Adapt positively to change by continuously updating skills
- Support any career goals by focusing on relevant training and development
- Be more productive and efficient by reflecting on your learning and highlighting gaps in your knowledge and experience and planning action accordingly

When organising your own face to face regional CPD events, the regional committee will note the attendees, the Regional Manager will then send the updated CPD certificate to your attendees. For webinars held on ON24, ON24 automatically generates CPD certificates.


Certificate of Achievement

This is to certify that

Insert name

has successfully completed xx CPD hours

Title of event

Learning outcomes:

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Standards. Professionalism. Trust.

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Eventbrite.

Setting up a registration page on Eventbrite

Your Regional Manager will set up an event on Eventbrite for your region. Please provide your Regional Manager with the following information at least 6-8 weeks in advance of the intended event:

- Date
- Venue
- Timings and agenda
- A snappy title for the session - designed to capture members' attention
- A brief synopsis (50 words max) summarising the session
- Up to six bullet points by way of the learning outcomes. These should be set out along the lines of 'after attending this session delegates will be able to: advise, distinguish, identify, recommend, use, organise, manage, explain, prioritise, understand....'
- Speaker's name, job title and company
- Maximum number of delegates

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Set Up A Webinar On ON24.

To set up webinars, please use our recommended webinar platform ON24.

Please ensure that the agreed topic is educational CPD with clear learning objectives and outcomes. There should not be a sales focus within the presentation. ON24 generates automated CPD certificates. Once you have a speaker and topic confirmed, please send them the speaker information form to complete and return.

After you've received the completed speaker form, contact your Regional Membership Manager who will be able to liaise with you around available dates to deliver your session.

Please leave at least 4 weeks' notice (ideally 6-8 weeks) to allow enough time to promote the session to the local membership and maximise registrations.

ON24 Functionality

The system has lots of functionality, which we recommend you utilise throughout webinars, to ensure lots of audience interaction and engagement.

Polls

Polls allow you to ask the audience live questions during the session and makes it more interactive.

It also allows you to capture specific data should you want to.

Supporting Documents

You can attach supporting documents to the platform. For example, white papers or links to other pages.

Videos

You can play videos during the presentation.

Multiple speakers

You can have more than one speaker.

Q&A

The audience can ask questions during the live delivery of the webinar. Please note only the speaker and host can see the questions.

System Check - Before Live Delivery Of Webinar

Before the live delivery of the webinar, we strongly recommend you do a system check with the speaker and host (at least a week before), to ensure everyone can log onto the system without any problems and familiarise yourselves with the platform.

How To Log In As A Presenter

This will allow you to see the back end of the system such as the presenter chat, prepare prior to the 'go-live' time and see audience submitted questions.

Before You Start

To ensure excellent connectivity we recommend wired internet where possible.

Please check connectivity status. Bandwidth should be high. If bandwidth is medium to low the platform will not function effectively.

Please Use Firefox or Chrome

Clear your cache

Close all unused applications, especially those that may have access to your webcam (Skype for Business, Microsoft Lync, etc.)

Disconnect from VPN

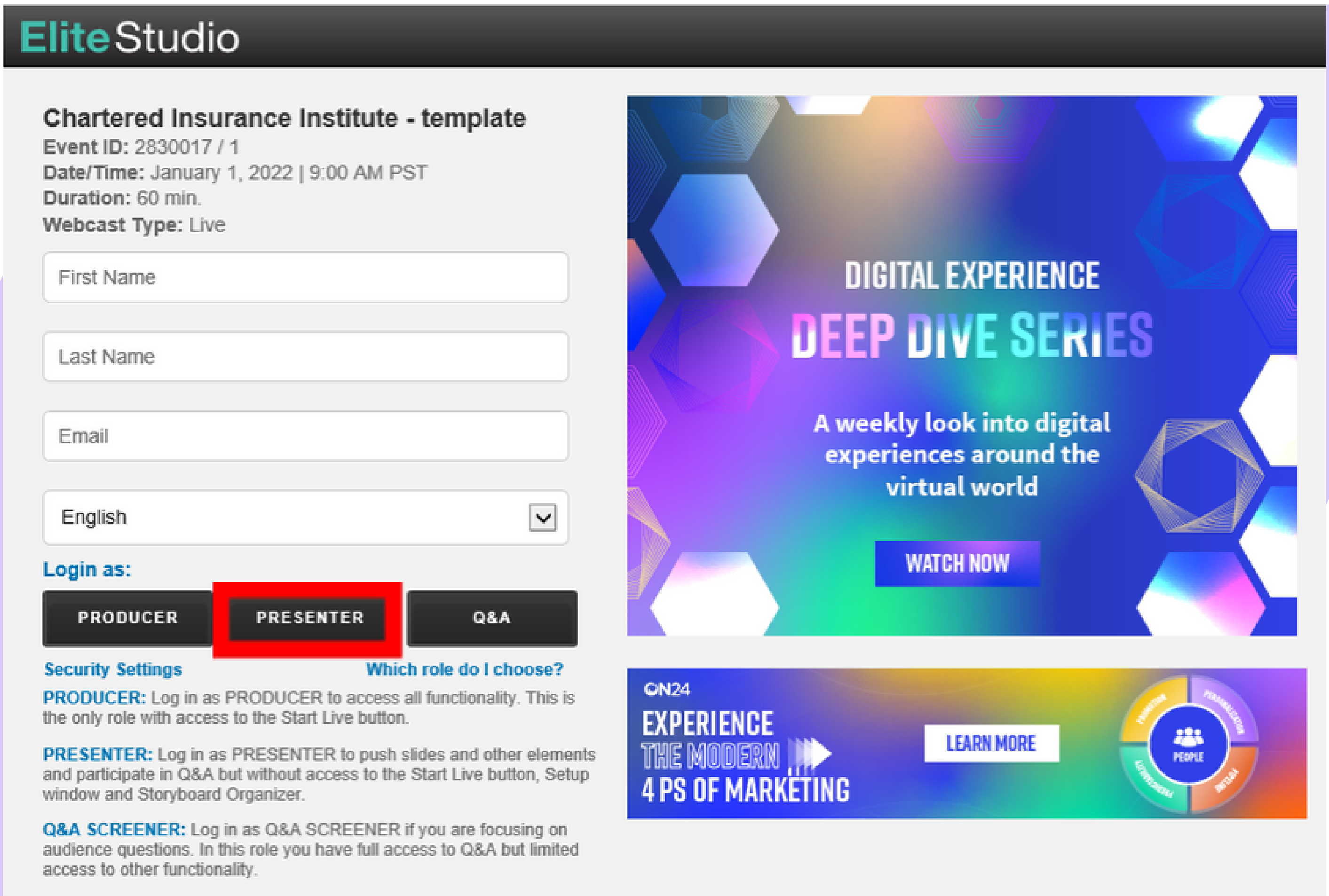
Test your connection at least 48 hours in advance, to address any issues prior to your event.

Virgin Media users

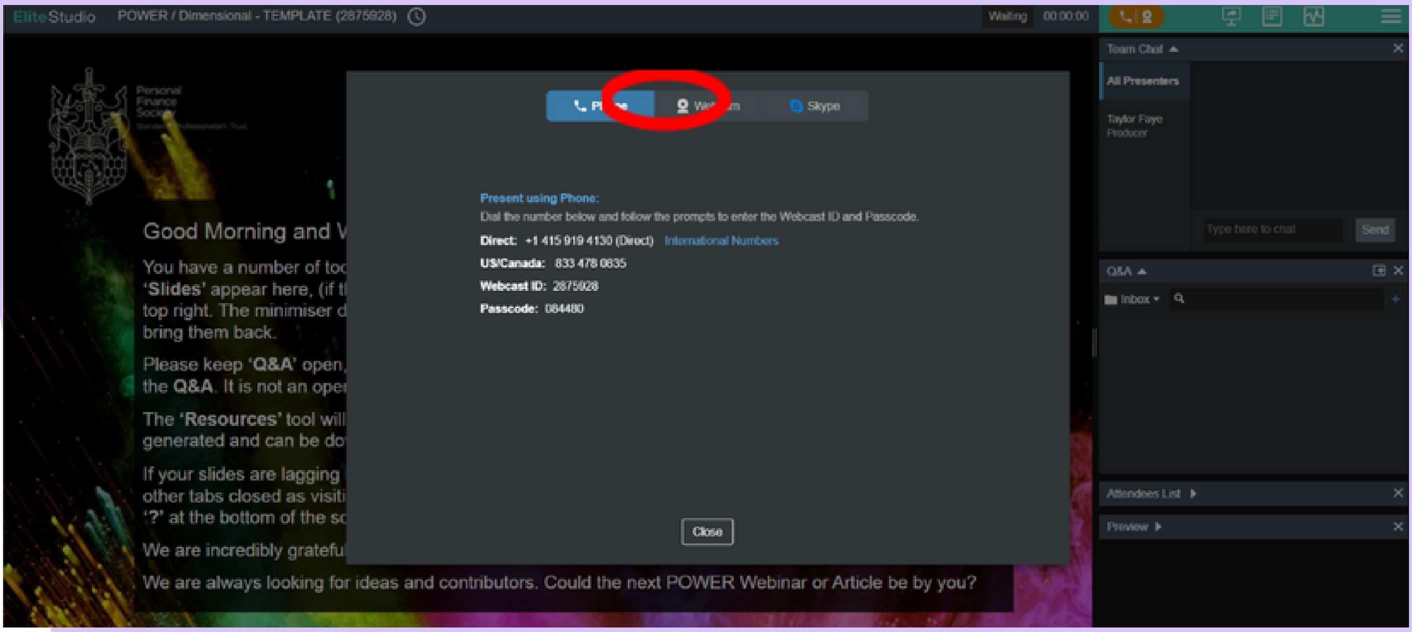
Please note, those with Virgin Media as their broadband provider may encounter issues with lag due to an ON24 system issue. To get past this, we ask that you connect to ON24 using your mobile hotspot as an internet source – this has been tested and removes any lag you may encounter.

Logging in

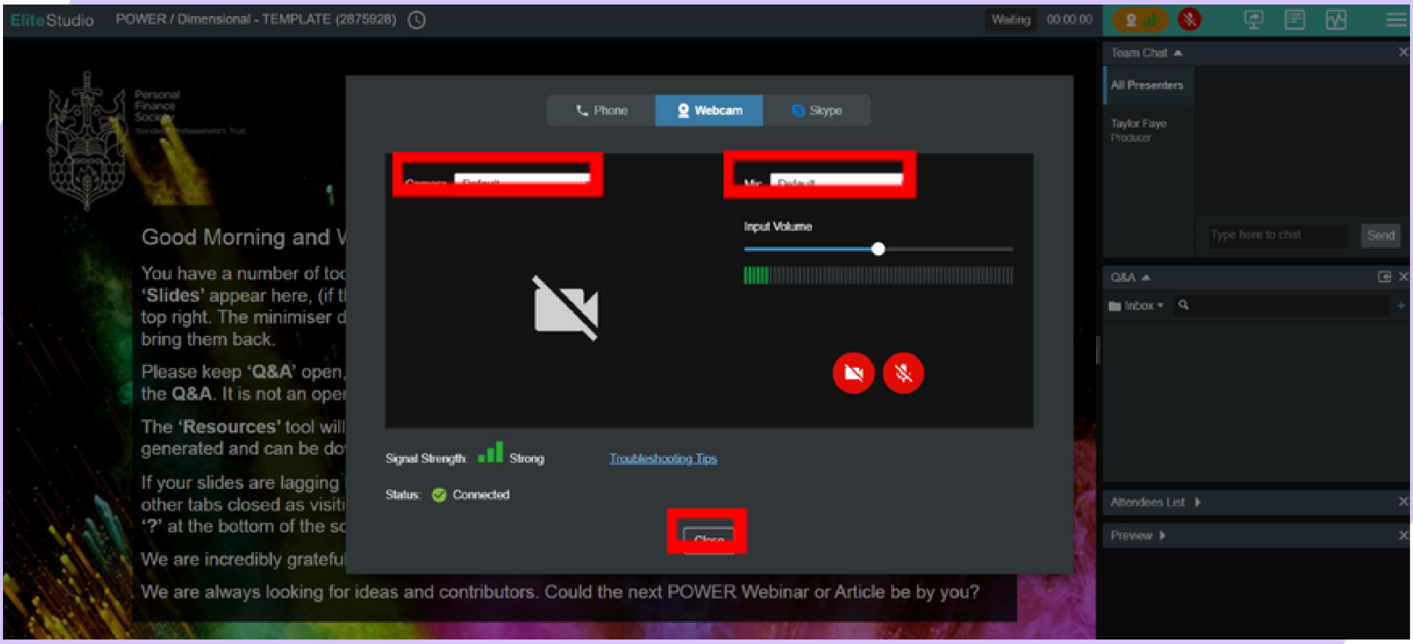
Once you receive the link to the system, which will be provided by your Regional Manager, you will not need to create an ON24 account, you will be asked for your full name and email to allow you to log-in. Choose 'Presenter'



Once logged in you will arrive at the below screen – click on webcam option which can be found in the middle. You will also find instructions on how to dial-in, should you have any technical issues.



Once the webcam option has been chosen you will see the below and will need to select your camera and mic source. If using a laptop with built in camera and mic, this will automatically choose 'default'. Once happy with your settings you simply need to press close at the bottom to join the call.



Webcam Troubleshooting Tips

- Refresh Presentation Manager XD (F5) and try to reconnect the webcam
- Confirm the browser isn't blocking the device from being accessed
- Try another browser – we recommend using google chrome
- Disconnect from any VPN's

What Else Is In The Pipeline.

1. PFS Network Knowhow

Replicate the Local Institute's Network Knowhow for the PFS by Mid 2024

2. Digital Marketing

Update the website and improve social presence

3. Central Revision Courses

Support a standardised revision programme working alongside active trainers. Provide centralised organisation, facilitate payments and deliver content

FAQs.

We hope you find this document useful, to answer any questions you may have about regional committees, activities, and funding. If you have any further questions, please feel free to reach out to your PFS regional manager.

What should we be aiming to achieve as a regional committee?
Each committee should aim to engage with members locally, provide a sense of community, facilitate learning based on local needs (revision courses or CPD) and provide value to local members. This can be done in several ways, via physical or digital events and your PFS regional manager is on hand to support with any activity. The committee progression planner document, provides some more detailed suggestions too.

Can we work with partners to support our local events?
We appreciate that financial services organisations (investment managers, product providers etc) are keen to support regional committees and have the opportunity to engage with PFS members. These organisations are able to support by providing expert speakers, funding and facilities for events. We recommend when working with these organisations, regional committees focus on delivering value for members and providing educational content for members, instead of focusing on products available or sales focussed presentations. When it comes to events a 'partner' could be a local firm of accountants, a chamber of commerce etc. So a mutually beneficial partnership

What type of engagement events should we deliver?
We encourage regional committees to deliver events that meet local member needs, and the aims/objectives of an event will naturally suit a different format. These could include;

- CPD Webinars, a face-to-face breakfast or conference
- Networking events
- Revision sessions virtually or in-person
- Workshops for smaller group focussed learning and discussion
- Skills focussed sessions, to help all roles support clients better such as communication skills or how to deal with vulnerable clients in a digital world
- Sessions focussed on developing personal skills such as 'building confidence and your emotional state' and 'how to develop and demonstrate credibility'

FAQs.

If you're struggling for inspiration on topics, you could look at the type of events that your local institute are running; https://www.cii.co.uk/membership/local-institutes/.

You could also ask local members what engagement and activity they would value. This could be done as a poll via social media platforms or included in your regional e-newsletter.

How do we ensure this doesn't replicate what is being delivered centrally?
The centralised programme will be themed into three key topic areas, which will aim to provide content relevant to all roles in financial services, throughout the year. We're working hard to finalise the programme for these events, and you'll be able to view these on the PFS website before the end of the year. We'll be sure to publicise this as early as possible, to assist you with your planning and ensure you can avoid replicating any similar content.

How do I run an event locally?
Your PFS regional manager is available to support you in running local events, whether this be virtually or in-person. We also have lots of support documents to help you with this process. The PFS also has recommended systems you can use to help, such as our ON24 webinar platform.

We're volunteers, with limited time to arrange these events. What support with the PFS provide to help us deliver more activity?
We really appreciate our dedicated network of volunteers and that their time is limited, we're grateful for all time the network dedicates to supporting the PFS. We have full time dedicated regional membership managers, who are the first point of contact for all support for regional activity. We also took on board feedback that more support would be needed and are working to resolve this for early 2024.

Should we work with other committees or local institutes?
The PFS recommend working with other local committees or local institutes, to deliver member engagement activities. It can be beneficial for all to work together on key activities and widen the professional network of your local members. If you need any support with this, your regional manager will be happy to help and can provide introductions to local committees or institutes.

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FAQs.

How do we provide CPD certificates to members for local events?

We can provide a CPD certificate template, that can be shared with attendees after the event. This template is a PDF file and can be personalised to your event.

If you're delivering a webinar via our ON24 system, the CPD certificate will be automatically generated and sent to attendees.

How can I engage with members, without access to member data?

There are several ways regions can engage with members and the PFS are happy to facilitate monthly communication with your region. If regions would prefer to send newsletters less frequently, such a quarterly or skipping a newsletter due to less upcoming activity, this should be communicated to your regional manager. To populate these newsletters, all content should be shared with your PFS manager, a week before the newsletter is due to be sent. A newsletter schedule for the year ahead will be provided to all regions and these can be tweaked to suit each region's needs.

If regional committees work closely with their local institute, they can also send communications via the data that institutes hold.

Do I have to work with my local institute to access funding?

No, the funding for committees issued from January 2024, will be specifically for your PFS committee to utilise and will be accessed via your regional membership manager. The PFS will hold the funds for you, which will be allocated for you to use in each calendar year.

You can also work with the CII local institutes, to deliver some member engagement, as they have funding dedicated to financial services members to utilise.

How do I access our regional committee funding and get invoices paid?

Each PFS committee will have access to £10,000 funding per annum. This funding should be used to engage and provide value to PFS members in their region, throughout the year.

The PFS will hold this funding and facilitate all payments on behalf of the regional committee. We'd ask committee members to please follow the process detailed in the guide, to utilise their funding.

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