# The role of an Inclusion in Finance Ambassador

- Ambassadors are unique in terms of the support they offer to Inclusion in Finance (IiF). They join in their personal capacity only. They work actively to champion IiF as individuals, contributing to IiF in a variety of practical ways
- Ambassadors come from a wide variety of backgrounds: some work within the investment and savings / FS industry but for a non-member firm, some are retired, some work for third-party providers to the industry, some run their own businesses, others are coaches and consultants, or DE&I specialists. Some may work for member firms or firms which should become members but in the latter circumstance, there needs to be discussion and agreement about boundaries for IiF's member only information
- As such, the Ambassador group is a hugely valuable resource for IiF to help drive impact and support the goals and ambitions (see below) through; time available to help with initiatives, connections and contacts within the industry, and to help with amplification of IiF's work
- Ambassadors need to have capacity and be willing to "roll up their sleeves." They must use their initiative and be able to forge connections to collaborate with others from across IiF
- Ambassadors can work without direction to identify clear tasks which play to their personal strengths and interests and align with IiF goals and messaging
- They are willing to communicate with the Ambassador Programme co-leads (contact information below) to advise on ideas, activity, and progress. They will also collaborate with other individuals within IiF, supporting the goals and ambitions in a variety of ways
- They will attend the planned quarterly Ambassador calls and be willing to prioritise this meeting in their schedules. This meeting is important as it contains detailed information about the work of IiF and where your help is most required

**Some ways in which Ambassadors can support / access IiF:**

- **Spread the word** in your daily work, emphasizing the value add of IiF to peers, your networks, presentations, at industry events and so on
- **Amplify the work of IiF:** Follow the project on LinkedIn (https://www.linkedin.com/company/inclusion-in-finance/) and actively like, comment, and share to spread news as far and wide as possible. Please encourage your peers to also follow
- **Introduce individuals** from non-member firms to IiF where possible so they can learn more and get involved. Where appropriate, introduce new potential members to Lindsay, the IiF Relationship Manager
- **Contribute to, support or lead IiF community/taskforce groups and initiatives**
- **Host events and webinars** for IiF on areas of special interest
- **Mentoring –** for example, The Walking Exchange
- **Other –** We welcome your all your ideas, suggestions and initiatives and love to hear how you would like to contribute to IiF

**Boundaries (what an Ambassador should not do):**

- Use their position as an Ambassador to explicitly promote or sell their own, or their company's products or services
- Use their position as an Ambassador as an alternative to an employer organisation becoming a member of IiF
- Join IiF as an Ambassador and be 'dormant' for long periods of time

- Use the status for their own Linkedin (or other) CV enhancement

As a reminder, member firms pay for IiF programmes, initiatives, events, webinars and content. Ambassadors can have access to member-only content and events where they have been directly involved in the particular work or where IiF wants to recognise a particular contribution. This is entirely at the discretion of IiF and the co-leads of the Ambassador community.

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## IiF's global ambitions for the next five years

- Inclusion of all: Ensuring opportunity, access and positive working environments for everyone across financial services
- Greater focus on cognitive diversity: Building awareness, tools and leadership capability to harness diverse thinking as a driver of innovation and performance
- Address under-representation: Expanding proven programmes to improve representation across socio-economic backgrounds, gender, ethnicity, neurodiversity and disability
- Global financial sector impact: Strengthening coordination across the UK, Europe and North America with a global framework and local adaptation
- Further, faster progress: Launching a new accreditation framework, enabling firms to benchmark progress and track long-term outcomes

## IiF's mission, vision and values

**Our mission:** To reshape the financial services industry to achieve better outcomes, underpinned by the twin foundations of inclusion and cognitive diversity to power robust decision-making and drive long-term business success.

**Our vision:** By getting this right, we will have embedded inclusion, created opportunity for all talent, and develop cognitive diversity that powers innovation. This creates value for clients, member firms and individuals as well as finance globally in the long-term. In this future, representation improves, culture thrives, and the industry appeals to, attracts and develops a broad range of exceptional talent. This finance industry earns trust because it delivers sustainable success to clients.

**Our values (Our fundamental beliefs and guiding principles):**

- Bold leadership: We challenge the status quo to create meaningful change
- Evidence-led: Our strategy is grounded in data and measurable business impact
- Collaborative impact: We amplify progress by working together across the industry
- Respectful challenge: We welcome diverse perspectives to drive better solutions

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## Useful contact details

**Ambassadors Programme Co-Leads contact details:**

Sarah Bates: sarah@sbates.co.uk
Shehzad Abbasi: ShehzadH@abbasi.holdings
Caroline Keetch: Caroline@halseykeetch.com
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**To change your contact details:**

Michele Moss: michele@michelemoss.co.uk

**Other key IiF contacts:**

General queries - Charlotte Mason: charlotte@inclusioninfinance.com
Communities – Monique King: monique@inclusioninfinance.com
Taskforces - Adriana Weber: adriana@inclusioninfinance.com
Marketing and communications - Linda Russheim: linda@htfinancialmarketing.com
Membership relationships and BD - Lindsay Hudson: lindsay@inclusioninfinance.com