

final

DEVELOPMENT PLAN 2010



CIPFA MIDLANDS REGION

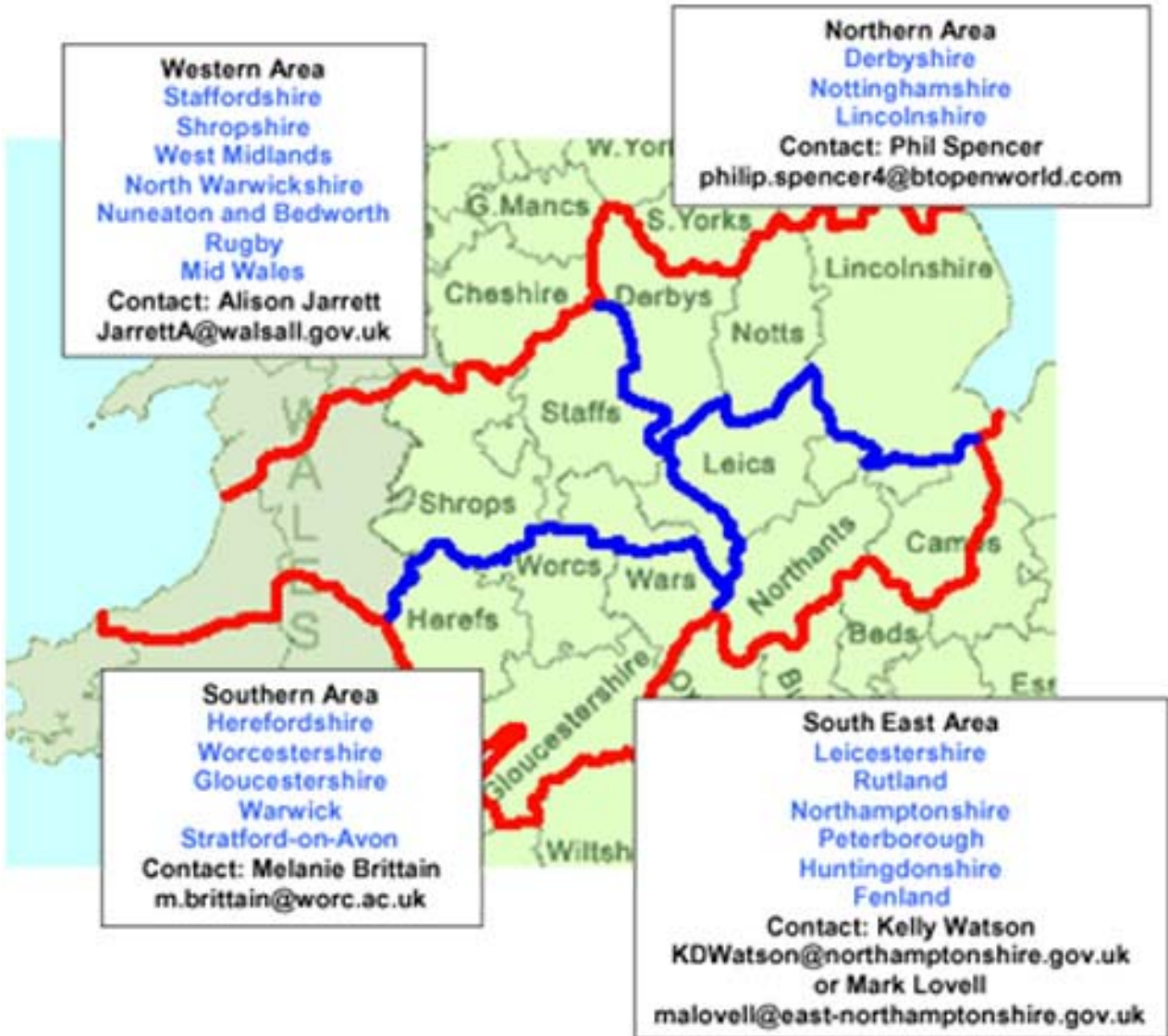
DEVELOPMENT PLAN 2010

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1. Introduction

CIPFA is the leading accountancy body in the public sector. The Midlands region stretches from the Welsh coast to Lincolnshire, and from the Yorkshire border in the North to the Wiltshire border in the South. The region is currently organised into four geographical areas. Even so, there are logistical challenges to bringing services for all CIPFA members and registered students in the region.



In 2008 the Midlands Region supported 2,458 members; of which 560 are retired. The tables below summarise proportions by gender and age group. Our overriding aim is to support the ongoing professional development of all our members; irrespective of their current career stage and aspirations.

CATEGORY	MALE %	FEMALE %
Active members	66	34
Retired	94	6
Graduates	47	53
Students	49	51
Overall	69	31

AGE GROUP	%
29 and under	9.7
30 – 39	18.8
40 – 49	29.6
50 – 59	22.7
60 +	19.2

This plan sets out the intentions of the CIPFA Midlands Regional Council for the calendar year 2010. It has been drawn up based on the Institute's agreed Regional Activities Model (see appendix 1) and the national priorities agreed by CIPFA's Board for the Regions. These provide for greater consistency of approach and reporting to reflect CIPFA's national priorities, while still allowing regional individuality and innovation to shine through.

2010 will be a very challenging year for the public sector. The current financial situation will require very significant economies to be made, and the profession will be at the forefront of helping to identify and implement those economies. This will undoubtedly increase the pressure on staff in the finance function, but will also be likely to restrict training and development budgets. The Regional Council has therefore prepared this development plan against that very difficult context.

Nevertheless, 2010 will also be an exciting year for this region. In September we will host Cipfa's Conference for the Regions at the Hippodrome Theatre, Birmingham. This will be even more poignant than usual given that 2010 celebrates Cipfa's 125th anniversary. We will also need to prepare for the overall national Cipfa Conference which will be held at the International Convention Centre in Birmingham in June 2011. Both of these are extremely high profile events and will require significant planning and preparation. We also need to continue our unique work in promoting the 6th form management game, and build on the success of our innovative CATS programme, annual seminar and dinner, and revised AGM arrangements. We will also strive to build on our events in the areas by trying to make as many high quality low cost events as we can in accessible locations across the region.

The Region's Development Plan supports the Institute's current National Development Strategy 2006 - 2010. CIPFA is currently producing a new national development strategy and will issue a draft for consultation in 2010. Cipfa Midlands continues to have a significant positive impact on the delivery of the aims and objectives of the Institute, through providing CPD activities, promoting the qualification and raising the profile of CIPFA's national and international roles, and it will therefore be important for us to contribute, individually and collectively, to the debate on the new national strategy. We recognise that our main focus is on the Regional membership and students, so our activity is intended to consider how best we can understand their needs and deliver optimum support locally, whilst contributing to the national direction and plans. By continuing to improve the way we communicate and engage with members and students across the Midlands, we are strengthening the CIPFA community of interest and widening meaningful involvement in our Institute.

We look forward to providing an enhanced programme of activities in 2010; building on our successes in previous years. We will proactively implement our development plan, and work in partnership with Robert Street and other stakeholders in promoting the success and sustainability of the CIPFA qualification.

**Steve Wellings, BA CPFA
Regional President of CIPFA Midlands**

2 Review of Progress in 2009

Our 2007 Annual report provides a detailed review of our activity; summarised below.

8 mainstream seminars/events – total delegates	322
4 CATS seminars – total delegates	295
1 student workshop - delegates	27
1 Regional AGM	36
Annual seminar	73
Annual dinner	78
Aggregate attendance	831
Aggregate numbers of members and students in Region	2,940
“Activity Indicator”	0.28
Aggregate attendance (from above)	831
<i>Made up of:</i>	
Members	733
Students	109
<i>Numbers in Region:</i>	
Members	2,458
Students	482
<i>“Activity Indicators”:</i>	
Aggregate	0.28
Members	0.30
Students	0.23

Our review of progress against the 2009 Plan is detailed below. The 2009 Development Plan reflected our regional strategic direction in response to a series of activities and workshops to reflect on our activity and re-energise for the future. The principles established were to:

- Be an effective face of CIPFA in the Midlands Region
- Provide a conduit for professional networking
- Provide support to the development of our members and students
- Be a vehicle for promoting CIPFA as a qualification – including CPD
- Reflect views of CIM members and students to the Institute
- Provide low cost, high quality, value for money CPD events
- Be a conduit between Robert Street and members
- Develop and enhance the profile of the Institute
- Support and encourage students and student membership
- Support employers
- Develop and share knowledge
- Deliver within CIPFA’s national performance scorecard

The CIM regional structure was redesigned to focus clearly and effectively on the delivery of these principles and was constituted around seven themed work areas; with every council member being involved in one or more of these themes:

Communications

- Communicating with members/students

- Employer/member interaction
- Consultation forums
- Website
- Raising our profile to stakeholders and the public at large

Events and Activities

- Providing courses, seminars, events and activities
- Providing networking opportunities
- Student training
- Area Events
- Regional Seminar
- Students society
- Sixth form management games
- Joint Robert St events

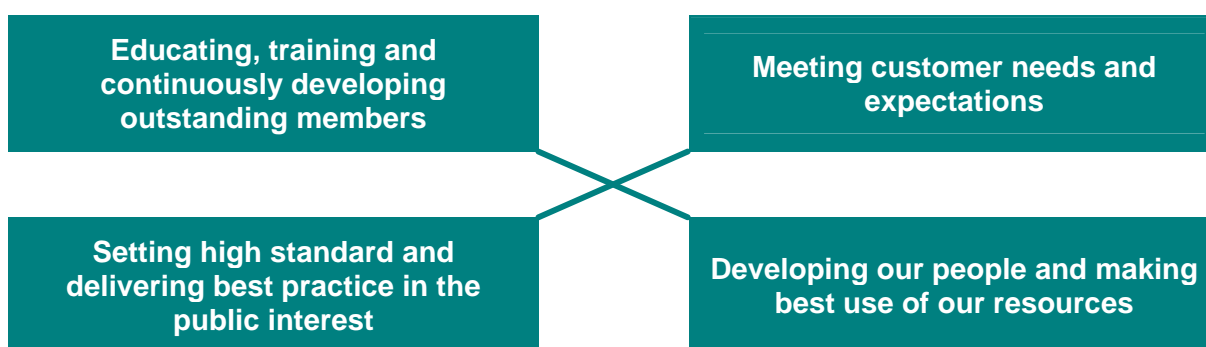
Good governance

- Managing well
- Providing leadership to the Region
- Operating within the Institutes framework
- Delivering against our plans
- Financial strategy and value for money

Sustainability and Growth

- Visibility, participation and representation
- Encourage and support volunteers
- Promoting uptake of the qualification and CPD
- Supporting the “head of profession” role

CIPFA’S PERFORMANCE SCORE CARD




Quartile 1:

Educating, training and continuously developing outstanding members

Key Activity	Key Themes	Budget £	Lead person(s)	Progress as at 30.11.09
1. To promote training / development events				
a) Hold a quality	Target attendance - 100	Self	Annual seminar	Held 6

annual seminar on a topical theme to support members and to raise the Region's profile	②	financing from sponsorship & ticket sales	working group LC/AJ/PH/SS	November 2009 92 attended % satisfaction Net cost £
b) Hold at least 10 events in the Region (including the seminar)	10 events held average attendance - 25 ④	Sourcing free use of venues and catering where possible (ex seminar/dinner)	Events team	? held so far
c) Build an event base in the Northern area.	2 events held total attendance 40 ④	As above	Events team	???
d) Consolidate the series of audit training events in other areas	At least 3 events in each area – average attendance 25	As above	Events team	Partly achieved (in Northern Area– to be revisited in 2010
e) To undertake the series of audit training events (CATS seminars)	2 specialist training events held ④	Self financing within existing resources	CATs lead (NF)	4 events held ? delegates in total £ net income 95% satisfaction rate

2 To promote and further develop the CIM Website; a key development tool

a) Continue to develop the website	Evidenced changes to the website 1. 20 events bookings 2. secure pages for areas established①		Web team CS + BJ	Achieved
b) Increase use of website	In top 2 of regions for hits ①			Not achieved

3. To promote more effective communication with members and students

b) Produce three "Centrepag" regional newsletters and distribute electronically.	3 regional newsletters produced and distributed to 2,000 members ①	Existing resources	Centrepag Editorial Board	2 produced so far this year – emailed to members
c) Ensure effective liaison with regional training providers	A minimum of one visit to each ③④	Existing resources	SS	Partly Achieved

4. To raise awareness of CIPFA in schools; our members of the future

a) Run sixth form management games	5 in the region 25 schools involved ^{③⑥}	£	CG	Achieved
5. To encourage student involvement in regional activities				
a) Student's Society	Students actively participating in activities - careers fairs, attending events etc ^{③④⑤}		Students society rep	Achieved
b) Maintain a minimum of 2 members of Students Society on CIM council	2 Student Society members nominated to CIM council ^⑤		SS	Achieved
c) Arrange events at CETC and Nottingham University to encourage student involvement	At least one event at each venue ^⑤		SS	Achieved
d) Continued involvement of the Student's Union in the 6th Form Management Games	Participation of at least 2 students in each 6 th form mgt game ^{⑤⑥}		CG	Achieved
6. To distribute information on careers fairs being held in the Region				
Continue to support the activities of Robert Street in delivering careers fair.	Ensure attendance at at least 4 careers fairs ^③		SS	Not achieved
See also: Q3 2a				

 **Quartile 2:**

 **Meeting customer needs and expectations**

Key Activity	Performance Indicator(s)	Budget £	Lead Person	Progress as at 30.06.08
1. To publicise more effectively what we do and raise the regional profile				
a) Raise the profile through the local mainstream and professional media	5 press releases on 6 th form management team games 2 articles on 6 th form games 6 other press releases made 2 articles appear ^{③⑥}	N/A	Comms working group	Achieved wholly on 6th form games, partly elsewhere
b) Publicise key events such including the Annual Seminar and Annual Dinner in the local press and Public Finance	Annual events publicised ^{②④}		Comms working group	Achieved
c) Publish articles in <i>Centrepage</i> detailing our core activities an how people can get involved in the Regional agenda	<i>Centrepage</i> article published ^{①③④}		Comms working group	Achieved

d)	More visible representation at national and local events, seminars etc – use of the CIPFA/CIM “brand” when members are participating	100% use of CIPFA brand in all events ③④		SS	Achieved
e)	Ensure we use quality venues for meetings and seminars.	Post event evaluation of venues and satisfaction feedback improved ④		Events working group	Achieved
2. To facilitate more effective networking to support our members and students					
a)	Undertake a customer analysis.exercise to determine wants and needs to inform our support offer	Redesign feedback forms at events to obtain wider feedback Engage sample of heads of profession in similar exercise Summarise outcomes and produce action plan and report to regional council	Opportunity cost of time	Events team President with events team Events team	Deferred To be reviewed for 2010

  **Quartile 3:**

  **Setting high standards and delivering best practice in the public**

Key Activity	Performance Indicator(s)	Budget £	Lead person/s	Progress as at 30.06.08
1. To involve new members in the Region - sustaining our future				
a) Invite new members to AGM to receive certificates.	Target attendance 15 ④⑤	Marginal cost of lunch – from AGM budget	President	Achieved ? attended
b) Involve new members in the work of CIM	4 new members indicating a wish to be involved 4 new members involved in areas and activities	Opportunity cost of time	Events team	????
2. To actively promote CPD to optimise continuous development and high standards				
a) Issue CPD attendance certificates in respect of each regional/area event.	Attendance certificates issued to each delegate (electronically) ③④		Secretary	Achieved
3. To recognise involvement of volunteers				
a) Submit a nomination for the Dr Hedley Marshall Memorial award.	Nomination submitted before deadline ④⑤	Opportunity cost of time only	President	Achieved – nomination made
b) Recognise outstanding contributions to CIM through invitations to Annual Dinner	Invitations to annual dinner made ②④	Marginal cost of meal/wine –	Seminar working group in	Achieved – ?? invitations sent

		from within annual dinner budget	consultation with CIM	
c) Continue to widen the invitation list at the CIM annual dinner to include all Members and contributors to promote networking.	Invitations sent to all members Invitations sent to partner organisations Invitations sent to contributors ² ⁴		Seminar working group	Achieved
d) Recognise personal development opportunities for CIM council members	Issue CPD certificates to all CIM members for activities constituting personal development ³ ⁴	Opportunity cost of time only	SS	Achieved – certificates to all CIM for 2008 activity
4. To strengthen contact with other bodies				
a) Ensure representatives of AAT and HFMA on CIM council.	Representatives identified ⁴ ⁶ 33% attendance ³	Travel costs normally borne by individual	Secretary	AAT rep not attended
b) President/others attend other bodies' events.	5 events attended	ditto	President	Achieved 5 events
c) Active PIN participation	CIM rep attends at least 50% of PIN meetings ³ ⁴	ditto	PIN rep	Achieved
d) Identify scope for joint events with (eg) the AAT, IRRV, HFMA and IIA Insurance group (not an exhaustive list)	At least 1 joint event taken place ³ ⁴		Events Team	Achieved – 1 joint event held
e) Invite influential guests to our annual seminar	10 guests invited; 5 attending ³ ⁵		Seminar working group	Achieved ? invitations sent ? attended
f) Encourage and facilitate participation of CIM members on national panels, events, speaking engagements and other networking opportunities	4 CIM members: - on panels - networking events - speaking engagements ⁴ ⁵		President	Achieved 3 on panels President 2 speaking engagements
See also: Q1 2a, 2b, 2c and Q1 6 and Q2 1a, 1b, 1c, 1d				



Key Activity	Performance Indicator(s)	Budget £	Lead person(s)	Progress as at 30.06.08
1. To make more efficient use of resources				
a) Seek organisations prepared to accommodate meetings without charging	10 uncharged for venues ⁴ ⁷		Events Team	?? uncharged for venues

Quartile 1:

Educating, training and continuously developing outstanding members

d) Seek support for Sixth Form Management Games from Robert St	Support continues from Robert St.	N/A	CG	???
e) Seek sponsorship for the Annual Dinner	Sponsorship secured ②⑦	Sponsorship of £4,000	Annual seminar working group	Achieved £4675
g) Post implementation review of the way we work	Discussion paper to CIM meeting	N/A	President	Deferred to 2010

2. To embed our medium term financial strategy

a) Refine and implement our MTFS	Redraft annual budget following ZBB exercise ⑦	N/A	Treasurer Deputy Treasurer	Deferred to 2010
b) Modernise our financial reporting to both CIM meetings and the AGM	New format reporting	N/A	Treasurer Deputy Treasurer	
c) Modernise the financial section within our development plan to include trends and other relevant analysis	New format in the 2009 development plan and the 2008 annual report	N/A	Treasurer Deputy Treasurer	
d) Refine and amend our reserves policy by 31.3.09	New reserves policy agreed by CIM	N/A	Treasurer Deputy Treasurer	
e) Close the defunct weekend school account		N/A	Treasurer	Achieved

See also: Q1 - 1a, 1b and 1c

3. Key Themes for 2010

As a regional Council we aim to improve in 2010 by being “**BETTER**”:

- B**eing there for members and students (**B**)
- E**ngaging more effectively with employers (**E1**)
- T**raining and events which are high quality and value for money (**T1**)
- T**argeting more volunteers (**T2**)
- E**nabling and promoting innovation (**E2**)
- R**epresenting Cipfa at local level (**R**)

We will do this by refreshing our relationships with students, members, and employers. We will improve communications, and deliver more high quality activities, including low cost activities where possible. We will increase our volunteer base, review the way we work, and seek to use some of our reserves to increase our influence. We will show the strength of Cipfa Midlands by organising our national events and feedback in an innovative style.

4. SWOT Analysis

The 2010 development plan has taken account of an identification by the Regional Council of our strengths, weaknesses, opportunities and threats. A summary of these is as follows.

STRENGTHS

- Strong history and reputation for achievement
- A well-produced and well-regarded website
- Strong Council with sound governance structure
- Sound financial management and base
- Committed group of existing volunteers
- 6th Form Game
- Annual Seminar and dinner
- CATS seminars
- Good sponsor base
- Paid administrative support

WEAKNESSES

- Increasing average age profile
- Not enough new volunteers
- Fledgling student organisation
- Reducing influence with employers
- Perception of some parts of public sector towards Cipfa – eg NHS
- Current area structure
- Size of region
- Not enough events, especially at low cost
- Lack of member/student database
- No centralised event management system
- Communication
- Insufficient clarity about new training places to inform graduate recruitment
- Insufficient information about Heads of Profession in employing organisations

OPPORTUNITIES

- Sharing best practice
- New students
- Focus on new markets
- Conference for the Regions 2010 and national Cipfa Conference 2011
- Cipfa's 125th anniversary
- Communications and new technology (eg twitter)
- PIN/links with other bodies
- Co-option
- Promoting “softer” and technical skills
- Better focus of Cipfa's Board for the Regions
- Economic situation and efficiency programme

- Available reserves to pump-prime initiatives
- Low cost events (eg PMPA speakers)
- Media
- Marketing the strengths of the Cipfa qualification
- Different ways of working, greater delegation, responsibility and accountability within regional Council

THREATS

- Other accountancy qualifications increasing their influence in the public sector – especially the growth of CIMA
- Reducing student numbers
- Relatively inflexible training provision compared with other accountancy qualifications
- Reducing public sector resources
- Pressures on time of Finance staff
- Volunteering for Cipfa seen by employers as unaffordable luxury?
- CIPFA financing for regions and threat to reserves
- Increased outsourcing in public sector

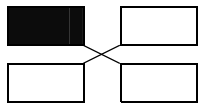
5. Development Plan for 2010

Targets are set for each activity. Some link to previous annual plan targets, demonstrating continuous improvement over a longer period. Some of the developmental work has less specific targets but reflects areas for improvement and/or helps create best practice. All are intended to support development over the period of this specific plan.

The activities are linked to Cipfa's national hallmarks as indicated in the tables.

CM Council members' names/roles appear against each target. These individuals are responsible for taking the lead on the designated issue to ensure the target is achieved; working with other colleagues, both on CM and within personal networks to achieve the best outcomes for CM and the Institute. We recognise the value of teamwork to achieve our goals. How each target links to our six key themes shown in section 3 above, using the symbols **B, E1, T1, T2, E2, R**.

Budgets have been identified where appropriate. CM remains grateful for the contributions made by CM council members and their employers in respect of (for example) free and/or subsidised use of premises, provision of lunches and refreshments, hire of equipment and use of consumables and also for allowing colleagues time off from work to attend meetings, plan, deliver and attend events and in covering travel time and expenses. This enormous contribution continues to enable CM to punch above its weight. Due to the voluntary contribution and nature of much of CM's activity there is no direct cost involved in many of the planned activities, but the opportunity cost of each individual's participation is acknowledged with thanks.



Quartile 1:

Educating, training and continuously developing outstanding members

This links most strongly to CIPFA Hallmarks 1 and 2:

H1 Accessible and Responsive (An Institute which is open and accessible, and responsive to the needs of its members and students, including those who wish to contribute to its work as volunteers.)

H2 Strong Sustainable Growth (An Institute which is making significant strides to grow its membership and to broaden its reputation across the full breadth of the public services in the UK and the Republic of Ireland, and which is also gaining ground internationally.)

Key Activity	Key Themes	Budget £	Lead person(s)
1. To promote training / development events			
a) Hold a quality annual seminar on a topical theme to support members and to raise the Region's profile	Target attendance - 100 B,T1,E2	Self financing from sponsorship & ticket sales	Annual seminar working group led by AJ
b) Hold at least 9 other events in the Region (excluding the seminar)	13 events held average attendance - 25 B,T1	Sourcing free use of venues, speakers, and catering where possible	Events Team
c) Revitalise event base in the Northern and Southern areas	2 events held in each area total attendance 80 B,T1	As above	Events Team
d) Continue the series of audit training events (CATS seminars)	4 specialist training events held B,T1	Self financing within existing resources	CATs lead (PF)
2 To promote and further develop the CIM Website; a key development tool			
a) Continue to develop the website	Evidenced changes to the website 1. 20 events bookings 2. secure pages for areas established 3. In top 2 of regions for hits B		Web team CS + BJ
b) Regular blog by Regional President	Minimum 4 blogs per year B		President
3. To promote more effective communication with members and students			
a) Produce three "Centrepag" regional newsletters and distribute electronically	3 regional newsletters produced and distributed to 2,000 members B	£2200	Centrepag Editorial Board
b) Ensure effective liaison with regional training providers	A minimum of one visit to each B,R	£200	Secretary
4. To raise awareness of CIPFA in schools; our members of the future			
a) Run sixth form management games	6 in the region 30 schools involved T1,T2,E,R	£1250	CG

5. To encourage student involvement in regional activities			
a) Support re-establishment of Students' Society	Students actively participating in activities - careers fairs, attending events etc B,T2,R	£500	CF
b) Maintain a minimum of 2 members of Students Society on Cipfa Midlands council	2 Student Society members nominated to CIM council B,T2		Students Society
c) Arrange events at CETC and Nottingham University to encourage student involvement	At least one event at each venue B,T1,T2		Students Society
d) Continued involvement of the Student's Society in the 6th Form Management Games	Participation of at least 2 students in each 6 th form mgt game B,T1,T2,R		CG
6. To distribute information on careers fairs being held in the Region			
Continue to support the activities of Robert Street in delivering careers fairs.	Ensure attendance at at least 3 careers fairs E,R		Secretary
See also: Q3 2a			



This links most strongly but not exclusively to hallmarks 5 and 6.

H5 High Profile in the Public Services (An Institute which is well known, influential and highly regarded within its core public service markets and more widely.)

H6 Delivering Real Improvements on the Ground (An Institute which is widely recognised to be playing a significant role in the development and implementation of real improvements in the public services provided to and for citizens.)

Key Activity	Performance Indicator(s)	Budget £	Lead Person
1. To raise the regional profile and communicate more effectively what we are doing			
a) Raise the CM profile through the local mainstream and professional media	6 Press releases on 6 th form mgt games 2 articles on 6 th form games 6 other press releases made 2 articles published R	N/A	Communications working group
b) Publicise key events such including the Annual Seminar and Annual Dinner in the local press and Public Finance	Annual events publicised R		Comms working group
c) Organise Cipfa Conference for the Regions at the Hippodrome Theatre, 23-24 September 2010	At least 100 delegates 95% satisfaction rate from participants T2,R	£1000 + sponsorship	CFTR organising team led by LC

d) Prepare for Cipfa national conference to be held in Birmingham in July 2011	Cipfa satisfaction with regional assistance 15 volunteers identified to help during conference B,E,T2,R	£1000 + sponsorship	CNC organising team
e) Help with organisation of Cipfa National Students Forum, Summer 2010, to be held in Birmingham	Successful Conference Minimum 50 delegates B,E,T2,R	£1000 + sponsorship	NSF organising team led by CF
f) Respond as CM to CIPFA's draft development strategy for 2011-2016	Report to CM Council B,R		President and Secretary
g) Support Cipfa's 125 th anniversary including badging all events and publicity in liaison with Robert St.			All CM Council
2. To facilitate more effective networking to support our members and students			
a) Contact established employer networks to raise awareness and build networks to inform future CM activity	Engage 12 heads of profession to facilitate networking opportunities Summarise outcomes and produce action plan and report to CIM B,E,R	Opportunity cost of time plus travel costs say £250	President



This links most strongly to hallmarks 3 and 4.

H3 Upholding Highest Standards (An Institute which exudes and promotes the very highest standards of probity, conduct, professionalism and equality of opportunity.)

H4 Influential in the Profession (An Institute which is acknowledged to be a significant influence within the Consultative Committee of Accountancy Bodies in the UK and the Republic of Ireland, and internationally.)

Key Activity	Performance Indicator(s)	Budget £	Lead person(s)
1. To involve new members in the Region - sustaining our future			
a) Invite new members to AGM to receive certificates.	Target attendance 10 B,T2,R	Marginal cost of lunch – from AGM budget	Secretary
b) Involve new members as volunteers in the work of CIM	4 new members indicating a wish to be involved 4 new members involved in areas and activities T2	Opportunity cost of time	Events Team

2. To actively promote CPD to optimise continuous development and high standards			
a) Issue CPD attendance certificates for each regional/area event.	Attendance certificates issued to each delegate electronically B	Opportunity cost of time	Secretary
3. To recognise involvement of volunteers			
a) Submit a nomination for the Dr Hedley Marshall Memorial award.	Nomination submitted before deadline R	Opportunity cost of time only	President
b) Recognise outstanding contributions to CIM through invitations to Annual Dinner	Invitations to annual dinner made B,T2,R	Marginal cost of meal/wine – from within annual seminar/dinner budget	Seminar working group
c) Continue to widen the invitation list at the CIM annual dinner to include all Members and contributors to promote networking.	Invitations sent to all members Invitations sent to partner organisations Invitations sent to contributors T2,R		Seminar working group
d) Recognise personal development opportunities for CIM council members	Issue CPD certificates to all CIM members for volunteer activities constituting personal development B,T2	Opportunity cost of time only	Secretary
4. To strengthen contact with other bodies			
a) Ensure representatives of AAT and HFMA on CIM council.	Representatives identified 33% attendance T2,R	Travel costs normally borne by individual	Secretary
b) President/others attend other bodies' events.	5 events attended R	£300	President
c) Active PIN participation	Cipfa Midlands rep attends at least 50% of PIN meetings R	£	PIN rep
d) Identify scope for joint events with (eg) the AAT, IRRV, HFMA and IIA Insurance group (not an exhaustive list)	At least 1 joint event taken place T1,E,R	Dependent on particular arrangements re venue, speaker, etc	Events team
e) Invite influential guests to our annual seminar	16 guests invited; 8 attending R	Modest postage/calls + dinner budget	Seminar working group
f) Encourage and facilitate participation of Cipfa Midlands members on national panels, events, speaking engagements and other networking opportunities	4 CM members: - on panels - networking events - speaking engagements B,T2,R	Opportunity cost of time	President
See also: Q1 2a, 2b, 2c and Q1 6 and Q2 1a, 1b, 1c, 1d			

Quartile 4:

Developing our people and making best use of our resources

This links squarely to hallmark 7.

H7 Best Use of Resources (An Institute which conducts its business efficiently and makes best use of the resources at its disposal.)

Key Activity	Performance Indicator(s)	Budget £	Lead person(s)
1. To make more efficient use of resources			
a) Seek organisations prepared to accommodate meetings without charging	10 free of charge venues B,E1,T1,T2	N/A	Events Team
b) Seek support for Sixth Form Management Games from Robert Street	Support continues from Robert Street T1,T2	N/A	CG
c) Seek sponsorship for the Annual Dinner	Sponsorship secured B,T1	Sponsorship of £3,000	Seminar working group
d) Post implementation review of the way we work	Discussion paper to CIM meeting B,E2	N/A	President
2. To plan our medium term strategy and align resources to it			
a) Prepare rolling 3 year development plan for 2011-2013	3 year plan to June CM Council E2		President/ Vice President/Secretary
b) Refine and implement our MTFs in accordance with new 3 year plan	3 year financial forecast including planned use of some reserves E2		Treasurer Deputy Treasurer
See also: Q1 - 1a, 1b and 1c			

6. Budget and Financial Information

Our budget has been well managed and has enabled our approach to be successfully developed and embedded. In line with our ethos of continuous improvement, our 2007 development plan included an implementation of a financial strategy and a fundamental exercise with the objective of embedding guidance for Council members on the parameters and policies of prudent financial decision making. The draft was shared with the wider regional council community for their feedback at the previous Conference for the Regions. In 2008 this important piece of work must be developed further and brought to a conclusion. We also recognise the importance of a proactive and robust reserves policy to

ensure that resource is targeted at key priorities and enables our overarching priority for supporting members and students in our region. Further details about our budget are set out below.

Balance Sheet - Year ended December 31 ...

	2006 £	2007 £
Balance at bank - deposit account	37,421	41,886
Balance at bank - current account	34	9,180
Balance at building society - general CIM account	4,038	4,038
Balance at building society - weekend school account	0	0
Sundry debtors	0	10,587
	41,493	65,691
Less:		
Sundry Creditors	2,885	21,005
	38,608	44,686
Represented by:		
Accumulated fund brought forward	27,006	38,608
Add: surplus for year	11,602	6,078
	38,608	44,686

Budget Statement

	2007 Budget		2007 Actual Outturn		2008 Budget	
	£	£	£	£	£	£
INCOME						
Subvention from the Institute		(19,500)		(19,514)		(20,200)
Website Award		(1,200)		(1,200)		0
Other income:						
Bank/Building Society interest (net)	(900)		(1,075)		(1,000)	
		(900)		(1,075)		(1,000)
TOTAL INCOME		(21,600)		(21,789)		(21,200)
EXPENDITURE						
Courses & conferences						
Regional - income			(11,518)			
Regional - expenditure			10,332			
Regional - Net		(500)		(1,186)		(2,000)
CIPFA Conference - income						
CIPFA Conference - expenditure			2,326			
CIPFA Conference - Net		3,000		2,326		2,300
Conference for the Regions		3,000		2,311		2,300
ACIPFAL		0		0		0
C.A.T.S - income			(22,244)			
C.A.T.S - expenditure			19,564			
C.A.T.S - Net		(3,000)		(2,680)		(2,500)
Students, Education & Training						
Education & training inc student bursaries	1,000		0			
C.P.D	0		0			
Students' Union	1,500		599			
Newly qualified members	0		0			
6th form management games	1,500		730			
		4,000		1,329		2,500
Other activities						
Communication with Members		3,000	60			60
Centrepge			2,165			2,200
Area Exec - North			0			500
Area Exec - South			0			
Area Exec - South-East			0			
Area Exec - West			0			
Sub-Total Areas		1,000		2,225		
Other Groups:						
Chief District int. Auditors						

December Club			
Others			
Sub-total Others	1,500	646	700
Hedley Marshall prize		69	
CIPFA in the Midlands AGM	500	1,029	1,050
CIM Annual dinner	0		
Management & administration			
Paid support	10,000	8,949	9,500
CIM Officers' expenses	500	551	600
Miscellaneous	500	142	150
	11,000	9,642	10,250
TOTAL EXPENDITURE	19,500	15,711	17,360
NET (SURPLUS) / DEFICIT	(2,100)	(6,078)	(3,840)

7. Facing the Future

The profile of this region will be substantially heightened in the period covered by this development plan. As the effects of the economic uncertainties bite deeper into the public sector over the next 12 months, it would be easy to turn our backs on the work we do for our profession and our Institute, citing budget cuts and pressures on time as the reasons.

Instead, it is vital that we look to exploit the opportunities which will arise for the Institute to increase its influence and profile. It is important that we continue to deliver excellence in whatever we do. 2010 provides many exciting opportunities for us here in this region to make a mark. The continued success of the Midlands region is heavily dependent on the commitment and goodwill of the volunteers who give so generously of their time, and of their enlightened employers who recognise the value of doing so to the continuing development of their staff. I would like to thank them all for their contributions and ask for their continued support and dedication for the future.

Steve Wellings, BA CPFA
Regional President - CIPFA Midlands