



The Chartered Institute of  
Public Finance & Accountancy

# Membership Offer Task & Finish Group

Brian Roberts  
Past President

# Terms of Reference

- To review existing membership offer in the light of the developing profile and diversity of membership and students, retention challenges
- Review feedback on services currently available to members
- To support the CMB and Senior Managers in the development and recommendation of the investment and development cases to the CIPFA Board.

## Group membership

- Brian Roberts (Chair)
- Drew Cullen (Director, Public Affairs)
- Alastair Barr (Head of Membership)
- Maria Flemmer (Marketing Manager, Membership and Education)
- Camilla Hayes (Regions Coordinator)
- Salema Hafiz (Head of International Marketing)

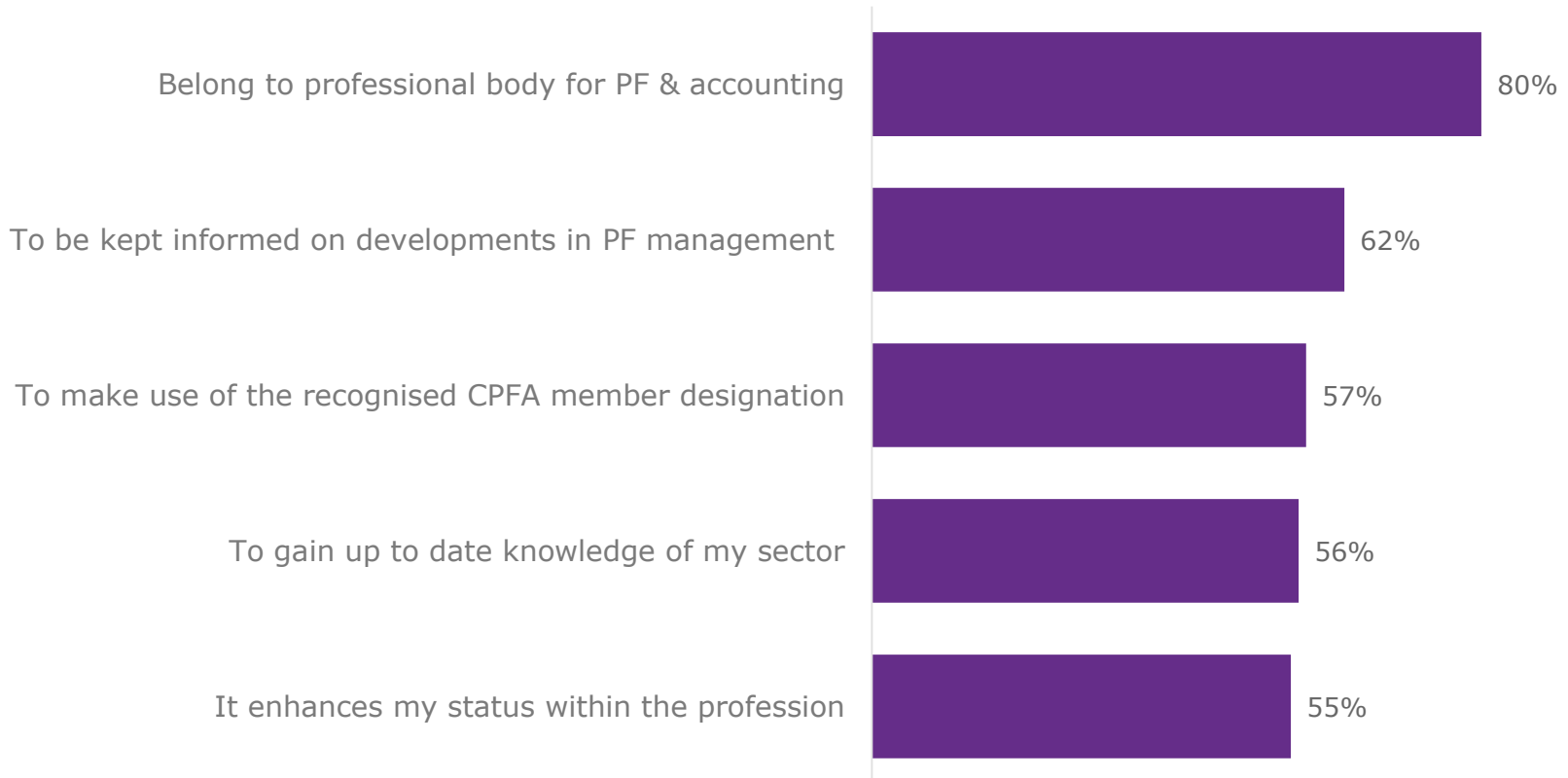
### Wider reference group:

- Jayne Stephenson Chair SMB
- Mohammed Maqbool
- Jon Williams
- Kathryn Long
- Chris Roberts President CIPFA Student Network

# What our members are telling us



# Primary motivations for being a CIPFA member in the UK



Source: CIPFA membership survey 2018 Survey carried out in October 2017. 1,407 respondents, 1,026 UK based, 381 international.

# Member satisfaction?

- 29% are fairly or very satisfied with member benefits offered
- Only 9% are not satisfied
  
- Services and benefits that are important to members (% score from UK members):
  - PF magazine (68%)
  - CIPFA professional designation (66%)
  - Policy and guidance (50%)
  - PF news emails (44%)
  - Spreadsheet newsletter (41%)
  - Regional CPD events (38%)
  - Technical Enquiry Service (36%)

## CIPFA membership context

- Some years ago both CIMA and ACCA overtook CIPFA as the highest frequency qualification in public services (FRC Oversight Body). In the age of *choice* employers increasingly reluctant to mandate CPFA
- Membership has grown rapidly in recent years in some areas, especially internationally
- Particularly due to an influx of new Bye-Law 5 members joining via MoUs with international bodies
- However renewal rates have been poor in those new categories
- Cancellation of international memberships exceeded new international members in 2017

# Lapsed member survey - feedback

Main reasons for not renewing membership in 2017:

- Unable to pay subscription (32%)
- Not representing value for money (24%)
- Membership no longer relevant (18%), now retired (14%)
- Difficulty accessing CIPFA (15%)
  
- 50% said changing membership fees might persuade them to re-join.

23% gave 'other' answers. The main issues reported were:

- Concern about the ability to pay subscriptions
- Members are approaching retirement or leaving the sector
- Lack of contact or response from CIPFA

Survey was carried out in May/June 2018, to 472 members who had lapsed in 2017, 114 (24%) responded.



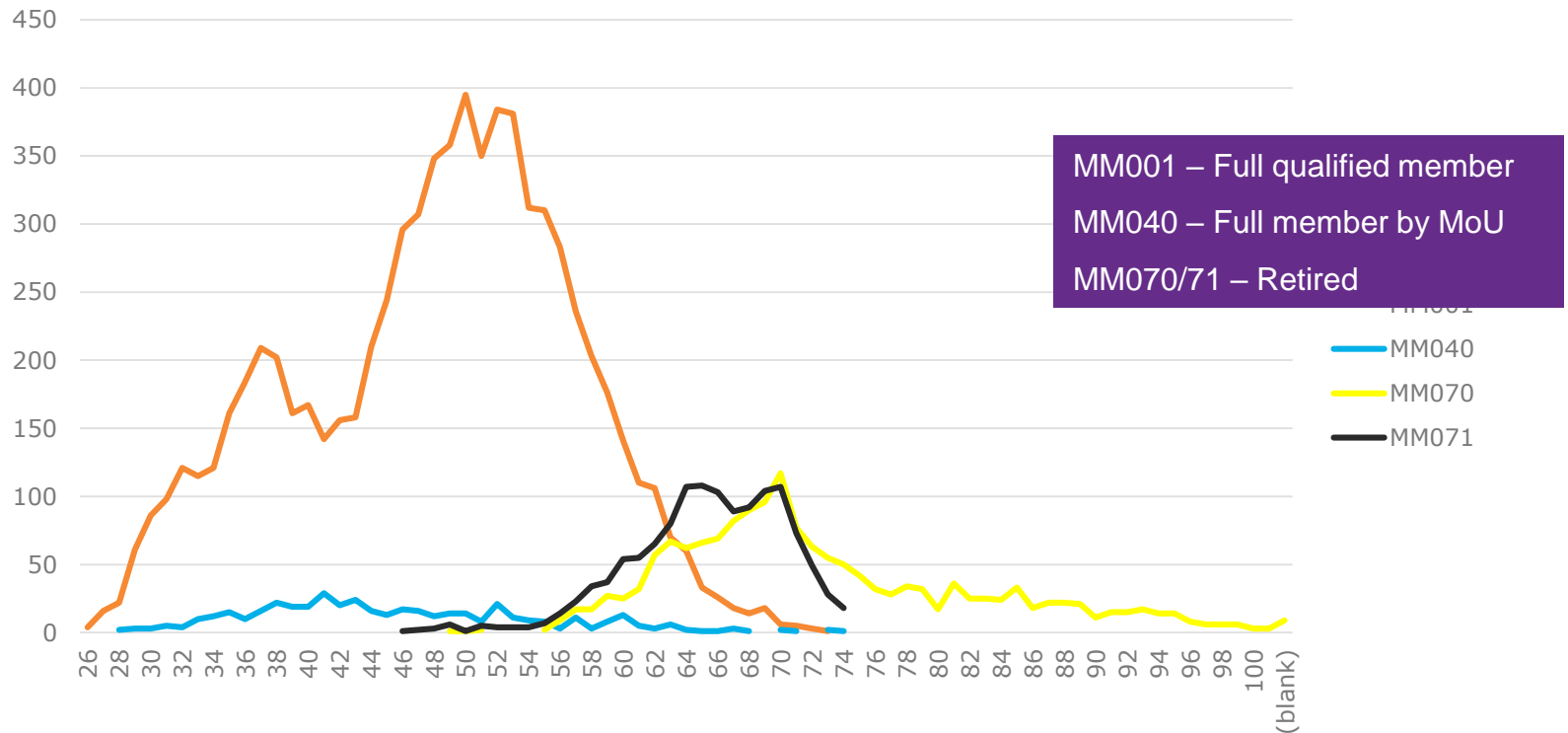
## CIPFA membership context

- UK membership is growing slowly but economically inactive retired members an increasing proportion of the whole
- Net decline in membership numbers overall last year

Professional Members	2017	2016	2015
New BL4	195	128	157
BL5	235	486	376
Cancellations and Suspensions	639	386	299
Net	-209	228	234

# Membership profile

- Aging membership demographic
- 34% of members are over 60 years old



## Key benefits for CIPFA members - usage

	UK	Intern'l	Take up / usage (where known / available)
CIPFA events	✓		There were 738 events in 2017 attracting a total of 9,914 delegates.
PF magazine	✓		Distributed to 13,700 Popular member service, score 68% in member survey
PF e-news	✓	✓	2017 users = 313,300 Page views = 824,884 Q1 users down 9% comparing 2017 and 2018
PF International		✓	Total number of users in 2017 = 120,655 Page views = 250,721 Q1 users down 38% and page views down 28%
International e-newsletter		✓	
Spreadsheet (e-newsletter)	✓	✓	Sent to 16,003 in Dec 2017. Open rate 43% and click through = 11%
Public Money & Management	✓	✓	Via CMI (see below)
Management Direct (CMI portal)	✓	✓	1,529 registered, 1,001 users in 2017
Technical enquiry service	✓	✓	
Members' directory	✓	✓	Page views from Jan 2017 to end of April 2018 was 62,974
Members' lounge (London)	✓		
CIPFA Rewards (discounts and offers)	✓	✓	Website visits in 2017 were 7,294. Take up was 1,339. Q1 visits to the website, 2017 v 2018, has increased by 15%.
Free CPD webinars	✓	✓	6 webinars in 2017, viewed by 5,892 (4,168 were for one webinar about IPSAS)
Expertise and insight	✓	✓	
CIPFA-Penna (recruitment)	✓		
Voting entitlement (CPFA only)	✓	✓	13,586 members are entitled to vote. Turnout in 2017 was 13.5%, this regarded by ERS as a normal participation rate
CPFA to CA Top Up	✓	✓	
CPFA to CGMA Top Up	✓	✓	
Fellows Digest	✓		2017 Digest was sent to 424 Fellows
Fellows Lecture	✓		34 Fellows registered to attend 2017 Lecture - c 8%
CIPFA Website		✓	Number of unique users in 2017: Home page = 207,189, Popular services include: Spreadsheet; CIMA top-up; Rewards; ICAS; Technical Enquiry Service.

# Competitor analysis UK Institutes

- Spotlight on UK institutes ACCA, CIMA, ICAEW and ICAS in comparison to CIPFA
- Based on website information and that in public domain
- Considered all aspects of the 'member offer' post-qualification (beyond specific benefits such as CIPFA Rewards for example)
- Detailed reports and summary on Yammer covering full scope of review
- Assessed with a neutral, objective, albeit unscientific eye

# Competitor analysis UK Institutes

First impressions	Area	How do we compare?			Key takeout
	Routes in and core proposition				Comparable. All bodies fail to make a very clear and compelling case to a newcomer. <b>Recommendation: review website acquisition content.</b>
	Emphasis of professional designation				As above, equivalent across board. <b>Recommendation: review framing of content to increase emphasis.</b>
	Clarity & communication of benefits				Stronger than most. What we have is largely well described and clearly signposted. However currency is poor in certain areas. <b>Recommendation: update.</b>
	Website effectiveness & appeal				All sites have different strengths and weaknesses. CIPFA compares broadly favourably on navigation, but dense narrative can lack appeal, sense of datedness in contrast. <b>Recommendation: finalise audit with recommendations.</b>

# Competitor analysis UK Institutes

Member experience	Area	How do we compare?			Key takeout
	Professional, technical & ethics support & content				CIPFA holds own well in comparison with content and service offer. No recommendation.
	Wider member benefits (Rewards, CMI, other)				CIPFA's is at least equivalent if not better on average and easier to find information on 'additional' services and benefits.
	Exclusivity of member benefits				All speak of exclusive benefits. In practice attached to a few common areas: designation, lifestyle discounts, event discounts, hard copy magazine, access to a subscription business information service. Gated member-only content does not seem to prevail rather administrative log-in. Many badge as exclusive content which is not

# Competitor analysis UK Institutes

	Area	How do we compare?			Key takeout
Member experience	Administrative information				Slightly weaker on balance. Some content out of date and hard to find. Fragmented across site. <b>Recommendation: review and update within wider audit</b>
	CPD offer & information				Appears weaker on review. Member CPD offer feels 'less than' & lost in commercial training. Regions are adding +ve value! Web content appears dated and complicated. <b>Recommendation: consider within wider CPD review</b>
	Personal development offer				As above, weaker on balance. Other bodies place greater emphasis on personal professional development across career stages, particularly at senior level. <b>Recommendation: as above</b>
	Member publication(s)				Favourable for CIPFA on volume and scope. We offer more to retired members. Cost implication. <b>Recommendation: review PF model</b>

# Competitor analysis UK Institutes

		Area			How do we compare?	Key takeout
Community	Member networks UK				Comparable to better in UK. Variety of models in place across the bodies. Physical member networks hard to find on non-CIPFA sites. We emphasise regions more strongly.	
	Member networks international				Less strong for CIPFA on balance. Not universally strong for others. ACCA and ICAEW reflect stronger international member networks & presence. <b>Recommendation: Centre of Excellence community focus will address</b>	
	Fellowship				Good for CIPFA. Modest but clear well-defined offer in comparison, well signposted, fee-base varies across bodies.	
	Retired members				Comparable to better across board. CIPFA's life membership model offers greater value (magazine) than equivalent model of other bodies but costs. <b>Recommendation: review model</b>	
	Voluntary opportunities				Comparable across board. All bodies provide voluntary engagement via governance and branch/region. ICAEW and ICAS strongest culture and infrastructure around member support and mentoring/coaching. <b>Recommendation: review within CPD project</b>	



# Competitor analysis UK Institutes

Member-centric? A view...	Area	How do we compare?			Key takeout
	Reflects pride in members & member personality				Varies across board. Technical presentation and complexity of websites almost block member presence & personality from shining through. ICAS stronger. <b>Action: review case study &amp; content strategy, comms and website. Can do better.</b>
	Member voice				Comparable across board with sense that ICAS does this better integrating more informal/opinion blog-style content onto web (from magazine?) All reflect technical editorial and views buried within forums. <b>As above.</b>
	Personal touch				Comparable. All bodies appear to struggle via website channel to provide a personable, user-friendly experience for members, due to complex web journeys, difficult content hierarchies, outdated pages, multiple contact touchpoints. CIPFA's web chat is a strong value-add. <b>Recommendation: review member website journey cross functional teams post web audit completion</b>

# Member consultations and staff workshop feedback



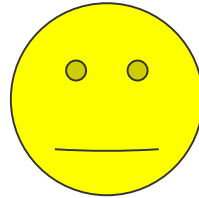
Proud to belong to public serving organisation(s)

Strong sense of belonging to supportive network (branches)

CIPFA makes a unique and valuable contribution to society

CPFA/ CIPFA brings recognition of deep expertise in public finance

CIPFA is highly respected and has valued commentary and insight on public finance/governance



Traditional = strong heritage but can be hidebound & fuddy duddy

Technically expert and specialised

Mixed professional development offer = good basic qualification but limited life long support



Administration complex and clunky

Customer service responsiveness poor

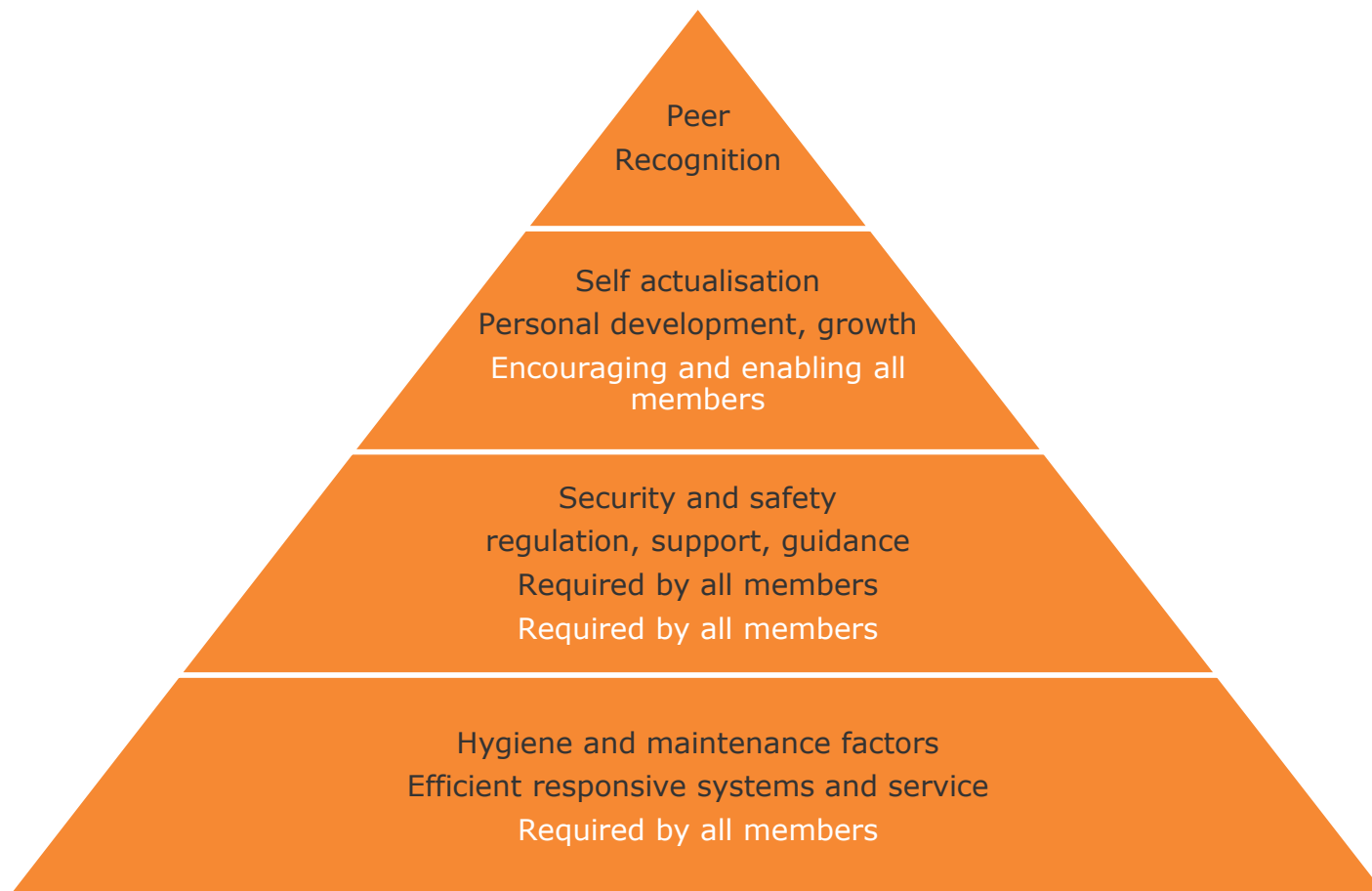
Frequent technology failures

Employers failing to recognise CIPFA value

Institute overly focuses on CIPFA business services to detriment of membership support

Ageing, lacking diversity and unrepresentative

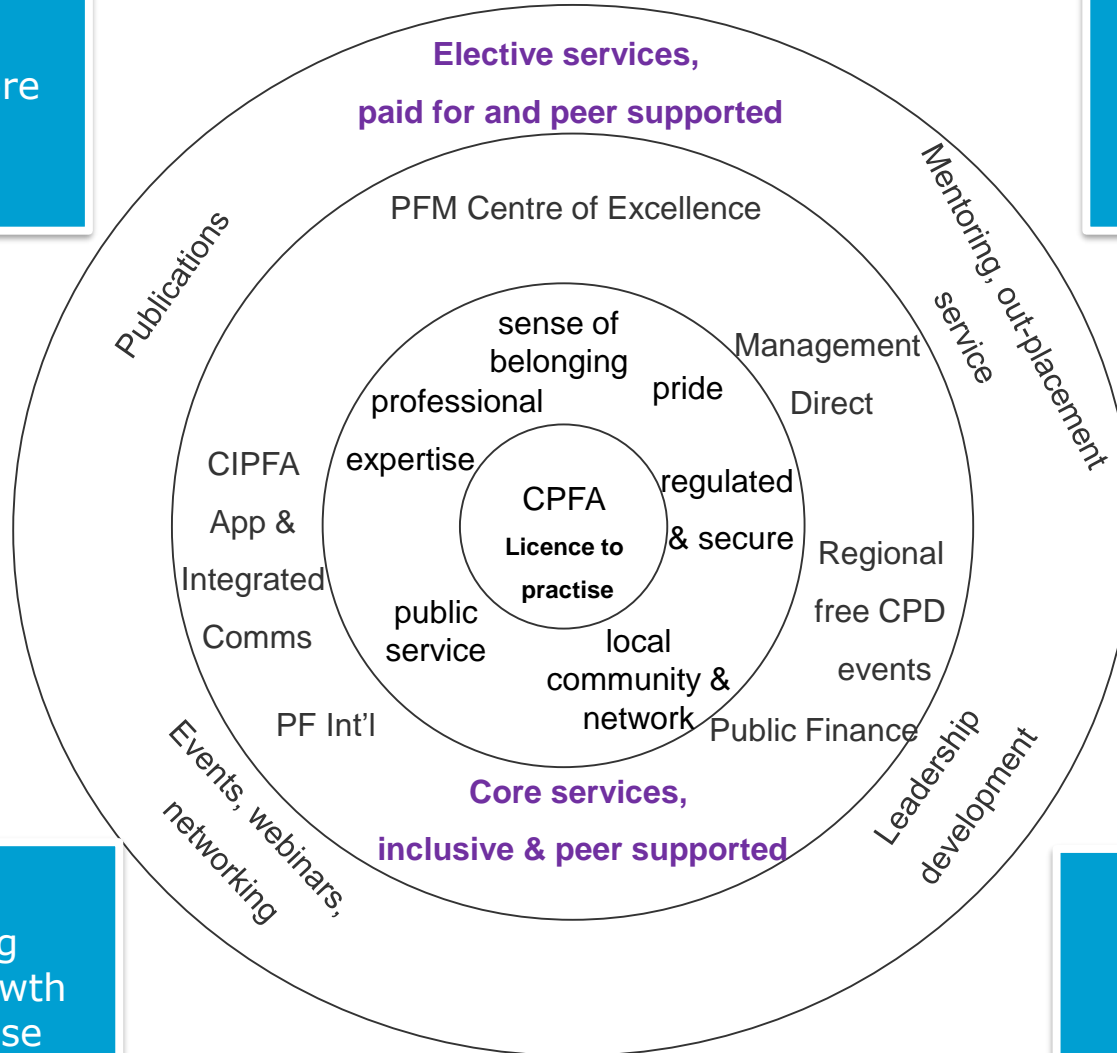
# What needs are we trying to meet?



## NEW CIPFA MEMBERSHIP MODEL

Relevance,  
focused on core  
proposition

Hygiene factors:  
simple things done  
well




Supporting  
personal growth  
and expertise

Digital first and  
personalised  
communication

	Main finding	Recommendation /action 1-3 months	Recommendation /action 3-6 months	Recommendation/ action > 6 months
Brand	Emphasis on: expertise and passion for public service(s) and best digital institute	1. Finalise vision and strapline (DC)	5. Shift centre of organisational gravity towards 'membership' (RJ/LE)	9. 2020 campaign to project unique value and values of CIPFA
CPD support	Current focus all on prequal, and no structured offer thereafter. No segmented offer for differing life stages Major deficit for international members Low take up and participation of Management Direct etc.	2. Roll out policy and technical team engagement with and support for regions (DP/CD)	6. Develop and launch online "centre of excellence" (RJ)  7. Launch country branches models in Malaysia/Pakistan/ Nigeria (AB)	10. Define a curriculum/life long knowledge and skills framework and develop support segmented on eg novice/expertise and specialism/leadership/ retiree life stages (LE)
Service and administration	Can be unresponsive, complicated and not easy to do business with	3. Launch new 'mycipfa' branch data dashboard (AB)	8. Implement rolling satisfaction feedback and continuous improvement programme	11. My CIPFA APP developed as part of IT and digital transformation programme
Communications	Overall +VE, but too much which lacks relevance	4. Evaluate online only options for Public Finance (DC)		12. Transition PF/PFI content to central support cpd/information resource

# Draft mission and organisational values



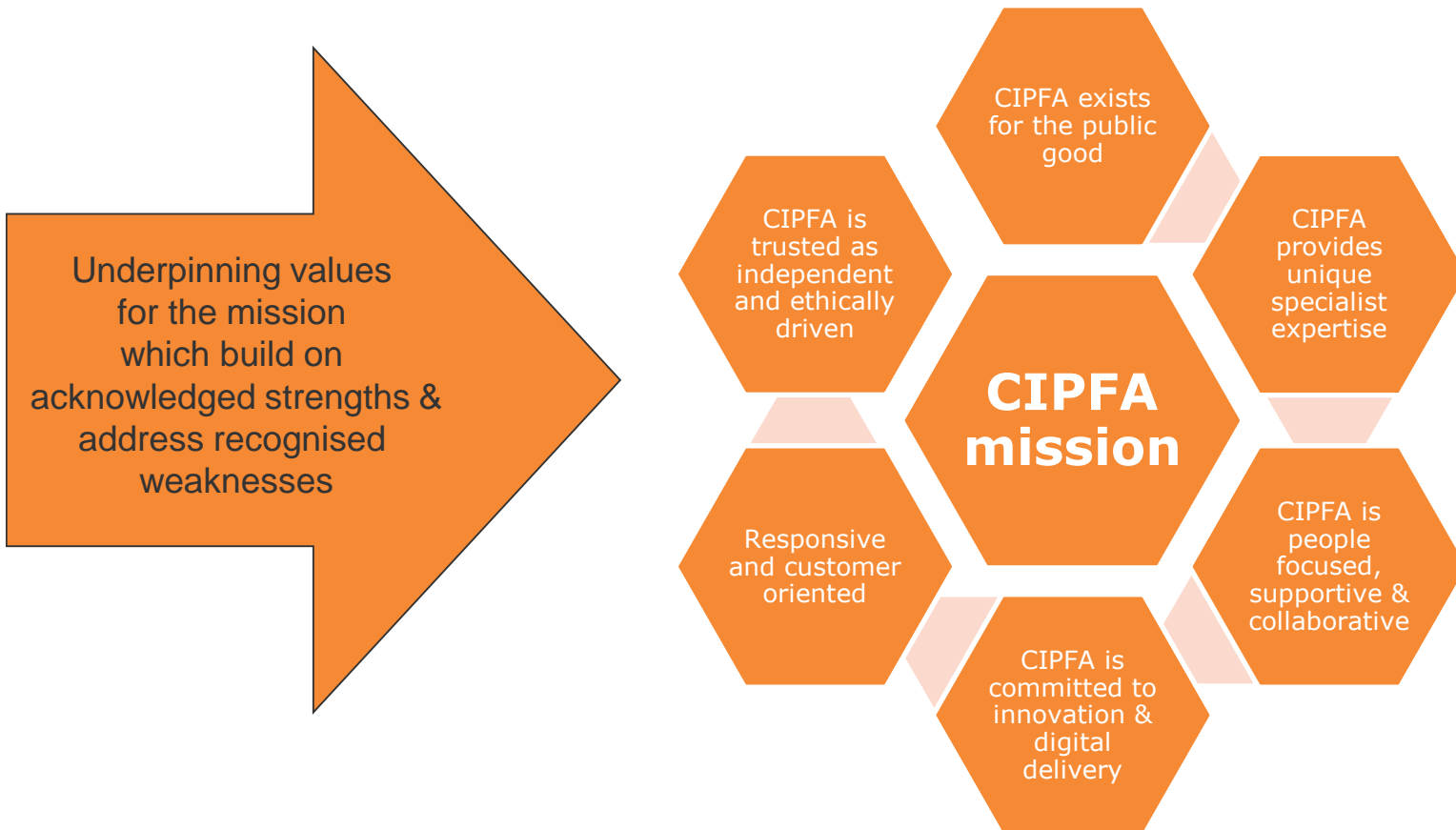
Mission, who we do it for,  
what we do & how we do it

With unique expertise, CIPFA builds trust and delivers excellence in public financial management through specialised personal development and advisory services to ensure public money and services are managed efficiently, effectively and securely for the benefit of all

\ the people in public finance

\ promoting trust in public finance

# Mission and organisational values



## 2019 strategic objectives

<b>Public Affairs</b>	<i>To be a strong advocate for sound public finance management, to have a voice, to provoke debate and to encourage innovative public service delivery</i>
<b>Education &amp; Members</b>	<i>To be the provider of choice for public finance lifelong learning throughout our students', members' and customers' careers, both here in the UK as well as internationally</i>
<b>Advisory Services</b>	<i>To build and grow our advisory services, based on customer need and risk, delivering support to customer organisations with public finance experts who understand public service and have a real impact on sound public financial management</i>
<b>Business Support Services</b>	<i>To deliver exceptional business support services to customers and colleagues, with a customer-centric mind-set, that enables us to make a step change in public financial management</i>