



The Chartered Institute of
Public Finance & Accountancy

Regional development plan 2020

Name of Region: South East

Section 1 - Contacts

Details of board/committee members and their role within the branch, and any particular projects they have responsibility for.

For example:

Position	Name	email	Telephone number
President	Amy Crowson		
Vice-President	John Barker		
Junior Vice-president	Kathryn Long		
Secretary	John Barker		
Treasurer	Nicki Cooper		
Deputy Treasurer	James Cook		
Data Protection approved contact	John Barker (as Regional Secretary)		
Events	John Barker		
Communications / Newsletter	Lillian Manning		
Mentoring lead	Tom England		
Regional Student Executive Chair	Will Goodchild		
Retired members events organiser	Eric Keighley		

Section 2 – Activities and achievements

Review of past year's activities: KPIs - Quantifiable outputs – Student and Member numbers - Key achievements - Commentary
<p>We are the largest CIPFA Region in membership terms. We have c4800 members and students affiliated to our region. Our area has significant diversity - geographically, economically and culturally - so we seek to tailor our activities to reflect that. We strive to complement corporate CIPFA themes and initiatives as they develop and translate those into suitable content for our events programme. And we are always mindful of the Institute Presidential themes for each year and extend regular invitations for those to be shared first hand by the current President or Vice-President personally at our larger regional events. We liaise with other institutes and associations who have members working in public sector finance around our region.</p> <p>Our 2019 calendar of events will be fully reviewed in our President's Report to our 2020 AGM. Annex 1 shows events already completed or planned for 2019.</p>

We have delivered a range of activities to support our various membership needs which includes specific professional and/or technical learning (e.g. revised code of Ethics), more general CPD needs – through awareness raising topics (e.g. Brexit, climate change and carbon reduction financial implications,) and networking/social events plus welcome receptions for new students and formal certificate presentation to newly qualified members. They may be summarised as -

Membership Conferences - full days (3 and our Regional AGM /Spring Conference (March)

Morning or afternoon seminars (8 - in London and 4 regional venues)

Evening and lunchtime CPD sessions (our hub group meetings - annually 1/3 per group and a central London evening event)

2 Speed Mentoring Events – central London

Annual Regional Dinner in central London – 200 places

Newly Qualified Members certificate presentations at our Annual Dinner

Retired members group visits to places of interest and lunch – bi-annual

Regional Student Network welcome receptions, revision evenings and annual pub quiz.

Events were regularly reviewed by Regional Council and delegate feedback, where presented, helped fine tune future events. Our Regional President's Annual Report to our AGM (Annex 2 for 2019) summarises our activity for the previous year and gives a flavour of the themes for the current year. Details of our planned events have been posted well in advance on our regional events webpages and were circulated to neighbouring regional colleagues. We have seen steady growth in the total available hours of CPD for 5 years running, a factor which helped us gain the 2017 Regional Events Programme of the Year Award.

Much of this has been possible because of our Regional Council's decision to continue to invest in our original Regional Development Project (now described as Extended Regional Support in our budget). We have continued to fund this partly from our reserves (and set some deficit budgets initially which have been incrementally reduced as our events programme has developed and matured - partly through the ability to attract new and/or sustainable sponsorship through delivery of a robust programme). This investment has been applied to help ensure we maintain our role as a Regional Council in a robust and sustainable manner. Successful delivery of our extending programme is critically dependent on this regionally commissioned and funded 'day job' design and event management capacity.

Our present annual turnover is now over £50k – with a high dependency on both cash sponsorship (around 50% of our budget) and 'in kind' sponsorship – event hosting - to deliver our planned programme. Our reserves are reviewed annually to comply with the corporate CIPFA guidance and remain at the minimum recommended level, given our diverse activity, according to current guidance

As part of the process of finalising of our Regional Development Plan for 2020 we have reviewed our budget line by line with the aim of prioritising maximum outcomes for our members. We believe that we have reduced every aspect to the minimum level whilst maintaining the current level of events we provide for our members and will continue to strive for additional sponsorship to supplement the subvention. This does not detract from the fact that our reserves continue to decrease towards the minimum recommended and agreed levels. We will review our minimum reserve requirements in the coming year to ensure that these are fit for purpose and maximise opportunities whilst maintaining a degree of prudence and are compliant with CIPFA guidance. Long term however, the level of activity we provide to our members is not financially sustainable and over the coming year we will have to make increasingly difficult choices about what we deliver and how. We will

continue to lobby CIPFA to provide funding certainty by providing a 3-year financial plan and at a minimum seek additional assurance on the level of subvention funding in 2021.

Section 3 - Plan for the next 12 months

CIPFA Objectives	Branch activities	Measurable Outputs / KPIs	Resources and expenses (if required)	Timescale
Profile raising, e.g. policy, networking, employer engagement	<ol style="list-style-type: none"> 1. Regular full day Conferences and local CPD events (our hub group meetings) across the region, designed to support and enhance members and students (and guest colleagues) knowledge and to offer networking opportunities. 2. Twice yearly mentoring events targeted at specific cohorts and themes to support our members connect with networks and experienced officers 3. Presentations to key employer networks (e.g. County/District Finance Heads) on the role of our region and its value to their staff for CPD and related personal development. 4. NHS networks engagement via an exhibition stand and delegate attendance at NHS FSD and AHST annual regional conferences and other local events within our region. 5. Membership of London Accountants Network, (currently led by ICAEW) which enables reciprocating participation by our regional members and students in a wide range of CCAB/ICMA events, plus occasional joint events on pan-sector topics (e.g. in 2018 a Brexit theme; for autumn 2019 the planned Spending Review implications for public service was deferred as a result of the parliamentary 	<p>Positive feedback from a significant majority of delegates. New hub groups and hosting offers</p> <p>Positive feedback from delegates and sponsors</p> <p>Positive engagement with NHS employers for Regional events</p> <p>Ongoing involvement (e.g. joint events)</p> <p>Maintain</p>	<p>See commentary/explanations in Section 4 Some specific values are shown below.</p> <p>£600</p>	

	<p>turbulence, but will be retimed for post Budget). Both replaced the planned Health and Social Care Integration theme which will follow when the Government's proposals are published).</p> <p>6. Annual Regional Dinner, held in London in mid- autumn. It is regularly supported by sponsors engaged in delivery of public services across our region.</p> <p>7. Participation in the annual Pan Accountancy Lunch, which raises CIPFA's profile regionally and nationally through the CIPFA's Institute President's attendance. We will reduce our contribution to this event next year as a result of insufficient funds and as we look to prioritise events as a result</p> <p>Contact with key Treasurer Society members to create dialogue on key issues and to publicise our regional events (SCT/SLT/ALAT/HFMA)</p>	<p>size/quality of event</p> <p>Participation and CIPFA profile raising</p> <p>Ongoing by individual Regional Council members.</p>	<p>Breakeven on a £25k gross spend. Sponsorship is critical to achieve that.</p> <p>CIPFA corporate sponsorship £600 supplemented by regional budget allocation £150</p>	
<p>Member engagement, e.g. with students, identifying new members</p>	<ol style="list-style-type: none"> 1. Regular whole regional and locally tailored eshots summarising information on forthcoming events. 2. Active Regional Student Executive organises social events – annual quiz evening, periodic exam preparation briefings 3. Bi-annual presentation events for Newly Qualified members to receive their certificates. These will now be delivered with minimal budget as part of our review in light of reducing funds available. We will look to maximise sponsorship opportunities to fund either through cash or use of facilities 4. Volunteering opportunities, regionally and locally, are regularly advertised verbally at events and periodically when events 	<p>Positive reader feedback and event enrolments</p> <p>Growth in student participation in events</p> <p>Take up levels and NQM feedback</p> <p>New volunteers engaged</p>	<p>£1800</p> <p>£3000</p> <p>Breakeven on £1k spend</p>	<p>8/10 per year are arranged</p> <p>Programmed for 2020</p> <p>Programmed for 2020</p> <p>Programmed for 2020</p> <p>Programmed for</p>

	<p>take place.</p> <p>5. Bi-annual Retired members Group Meetings – usually an organised visit to a place of interest in our region with a lunch arranged.</p> <p>6. Regional mentoring scheme as detailed above ,</p> <p>We will also continue to liaise with our adjacent regions to offer members across our SW and CIM boundaries access to our regional events (e.g. Wessex Conference, Winchester and our East Anglia day conference and related local hub group events. We have also extended invitations to our Wessex Conference to Channel Islands colleagues.</p>	<p>Level of retired member participation</p> <p>Successful mentor/mentee relationships</p> <p>Evidence of successful cross boundary working</p>	<p>Sponsor funded launch 2017 – each event cost is estimated at £900.</p>	<p>2020</p>
<p>Events, local focal point for members and other stakeholders</p>	<p>The 2020 Regional Event Plan (attached as Annex 2) gives details of type of event, with dates and venues status.</p> <p>As already emphasised, we are already, and will continue to incorporate the current Presidential Themes into our 2019/20 rolling Events Plan – which is reviewed and fine-tuned as needed at each Regional Council meeting.</p> <p>We also plan to support consultation proposals for the CIPFA 2020 Project - by facilitating local workshop venues as requested and inviting presentations on the project developments and outcomes in our regional event programmes.</p> <p>We will also develop opportunities to include presentations on diversity and inclusion and personal wellbeing in our 2020 member event programmes.</p>	<p>Evidence in content of events.</p>	<p>£1500 budget to support events. Most events are planned to break even on approx. £9k total spend.</p> <p>£9250 to direct and administer the delivery of the events programme and to secure sponsorship.</p>	
<p>Communications,</p>	<p>Regular eshots (see above), website carries</p>	<p>Regular liaison</p>	<p>Regular eshots (see</p>	<p>Regular liaison</p>

<p>newsletters, website</p>	<p>event and related information. Regular contributions are submitted to Spreadsheet. We continue to develop our use of social media for promoting events and stimulate commentary/engagement amongst our members (and other interested parties).</p> <p>We also plan to investigate over the coming year the use of alternative delivery platforms for our CPD events such as Webinars to keep pace with the changing requirements of our members in terms of the the way they wish to engage and their capacity to attend events in person.</p>	<p>with marketing team for eshots Evidence of regular and/or growing our regional membership engagement.</p>	<p>above), website carries event and related information. Contributions are submitted to Spreadsheet. We continue to develop our use of social media for promoting events and stimulate commentary/engagement amongst our members (and other interested parties).</p>	<p>with CIPFA marketing team for eshots</p>
<p>Governance, e.g. local branch meetings</p>	<p>We programme 4 Regional Council Meetings annually, plus our Spring AGM. We have a supportive culture in our Council for new initiatives that are realistic and are likely to be attractive to our regional membership.</p> <p>Attendance at CIPFA Annual Conference and planned Regional Forums.</p> <p>Note - We will maintain our current budget for the CIPFA Conference as we see this as a priority event within the calendar. As the 2020 conference is in London, we anticipate providing Regional support in terms of a stand and volunteers to help support delegates navigate the conference. Before committing to this we would seek discussions with CIPFA in terms of how additional costs incurred can be covered without putting additional burden on the Council budget.</p> <p>In regard to the Regional Forum whilst we still regard this as priority and valuable event, we</p>	<p>Quality agendas and effective meetings. Communication of Council business to relevant points in a timely and accurate way. Professional discussion/debate to evaluate new initiatives, with effective risk evaluation where required.</p> <p>Regular and appropriate delegate attendance. Positive participation and engagement in these events</p>	<p>£5500</p> <p>Currently budgeted as – £2000 Annual Conference £1500 Regional Forums</p>	<p>We have a supportive culture in our Council for new initiatives that are realistic and are likely to be attractive to our regional membership. Specific Groups and some of our hub groups will hold additional meetings as required.</p>

	have taken the decision that we are unable to send more than 1 to 2 delegates as we look to reprioritise our budget in light of our decreasing reserves.			
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Section 4 - Resources

	Value (£)	Comments
Opening Balance (anticipated for the start of the year)	15,000	
Reserves	15,000	Same as opening balance?
Core subvention (basic to operate branch)	18,000	This sum is required to deliver (not develop) our 2020 regional activity, to service cash flow and maintain reserves, after identifying where to scale down some previous year activities.
Development funding sought	??	The £18k subvention requirement is to maintain (not develop) our planned activity level.
Income from other activities (e.g. events)	5,100	
Sponsorship	27,000	And substantial 'in kind' for event hosting (see below)
Other resources (e.g. use of meeting rooms)		Unquantified but we regularly use sponsor venues for Council meetings, events and AGM/Spring Conference (which prior to this cost us £5k to run)

Expenditure (related to the activities in Section 2 above)	52,020	
Expected closing balance	13,080	

Section 5 - Timetable and Calendar of activities for 2020

January		No Regional Events planned
	29	Regional Council meeting (PAC Group Victoria)
February	25(tbc)	East of England NHS FSD Conference (Newmarket) Speed Mentoring Event - Host venue to be confirmed
March	12 w/c 9 or 16 tbc tbc	PF in Wessex Day Conference (hosted by Hampshire CC, Winchester) London Division Spring Seminar West Sussex Hub Group - County Hall, Chichester Hub Groups
April	20 tbc tbc	Regional AGM/Spring Conference (hosted by Grant Thornton, 30 Finsbury Square, EC2A 1AG) Hub Groups Residential Spring School, Reading University
May	tbc tbc	Retired Members' Group Meeting Regional Council Meeting (CIPFA, Mansell Street)
June	tbc	Hub Group Meetings
July	8/9 tbc tbc	Public Finance Live - CIPFA Annual Conference - QE Conference Centre, London London Division Summer Seminar Hub Group Meetings
August		No Regional Events planned
September	tbc tbc tbc tbc tbc	PF in East Anglia Day Conference - Newmarket, Rowley Mile Regional Council Meeting (CCLA provisionally hosting) Central London CPD & Networking Evening (CCLA provisionally hosting) Annual CSN/LD Pub Quiz (venue tbc) Hub Group Meetings

- October**
- tbc Pan Accountancy Lunch - Mansion House, London
 - 10(am) London Division Autumn Seminar - CCLA hosting 85 Queen Victoria Street, London EC4V 4ET
 - 10(pm) Speed Mentoring Event - Host venue to be confirmed
 - 18 Retired Members Meeting
 - tbc Hub Group Meetings
- November**
- tbc Annual Regional Dinner - London Marriott Hotel, Duke St/Grosvenor Square, London W1K 6JP
 - tbc Hub Group Meetings
 - tbc CSN-SE Revision Evening/Health & Wellbeing tutorial
- December**
- 3 Regional Council Meeting
 - tbc CSN-SE Post exam and networking reception

Regional Hub Groups - Local Events to be arranged by these groups (typically a half day or evening event)

London
Wessex
Thames Valley
Cambridge
Essex
Kent
Norwich
West Sussex
Hertfordshire
East Sussex