

CIPFA South East Regional Development Plan 2021

CSE Council 10 February 2021

Paper SEO2103(1)

Section 1

Committee contact information

Role	Full name	Email address	Telephone no.
President Vice President Junior Vice President	Amy Crowson John Barker Kathryn Long		
Secretary Treasurer	John Barker Nicki Cooper		
Data protection approved contact	John Barker Lillian Manning		
Events	John Barker Plus a network of volunteer hub group leaders around our region		
Communications and Newsletters	John Barker Plus contributors from local/annual events etc		

Special Projects (if applicable)	The Regional Development Project (ongoing, and is a paid commissioned role, financed from the annual subvention) provides leadership, executive and admin support to deliver our diverse range of events and activities across our region. NB - current project leader is also the Regional Secretary.	Further contact info can be provided for individual events and activities if required.	
Additional support			

Regional Council and our AGM agreed in April 2020 that the holders of the Regional Officer roles due to expire on 30 April 2020 would remain in post (as shown above) until further notice, to maintain effective communication during the Coronavirus emergency. When Regional Council and/or a 2021 EGM or AGM determines, the successor role holders to take office during 2021 are proposed to be –

Regional President – John Barker

Regional Vice President – Kathryn Long

Junior Vice President – Nicki Cooper

Regional Secretary and Regional Treasurer – holders are to be confirmed when a 2021 succession date is agreed.

Section 2

2020 activities and achievements

Provide a summary of your regional activities over the course of 2020 (this should also include planned activities for the remainder of the year).

Detail quantifiable outputs, key achievements and any relevant commentary.

Planned activity for 2020 – Annex 1 shows details of planned/actual event dates

This Annex shows

- our live events, those being delivered digitally from April and some activity postponed or cancelled during 2020.
- our Regional Hub Groups.

We had originally planned -

4 x Regional Council Meetings

1 x Regional AGM

1 x Annual Regional Dinner

1 x Annual CIPFA Conference participation as host region

4 x CIPFA Regional Forums – full participation in each teleconference and the annual summer/autumn meetings

2 x NQM certificate presentation receptions

- 3 x CPD & Networking Evenings (central London)
- 4 x Full Day Conferences - Wessex, London, Kent and East Anglia
- 2 x NHS FSD Workshops and CIPFA stand servicing
- 15 x Half Day Hub Group Meetings
- 1 x Residential Conference (2 days in September at Wantage Hall, Reading University))
- 2 x Speed Mentoring Evenings
- 1 x CSE-SN Annual Pub Quiz
- 2 x CSE-SN Revision Evening and CPD/Tutorial Evenings
- 1 x CSE-SN Post Exam and networking reception
- 4 x CSE-SN Executive Meetings
- 2 x Retired Members Group visits

The impact of Coronavirus on our 2020 and 2021 regional activities.

Between January and March 2020 our planned live programme was delivered. With the announcement of Coronavirus restrictions on 23 March, and in accordance with corporate CIPFA advice, in early April the remaining planned activity was converted into a digital programme, initially only until July. However, on 30 April when the extent of the pandemic impact was clearer, Regional Council reviewed that initial decision. It decided to convert our summer and autumn live CPD and governance events to digital ones (wherever possible) and to cancel (or postpone) our annual residential conference, our Annual Regional Dinner and NQM receptions. Subsequently, on 17 September, Regional Council agreed that all remaining events in autumn/winter 2020, through to Easter 2021 initially (governance, social and ceremonial), will be now planned to be delivered digitally or will be shown as provisional only, depending on relevant Coronavirus Regulations permissions.

The outcomes set for our programme for 2020 have been –

- CPD live events - Positive attendance numbers. Feedback was collected by delegate feedback forms which are collated and reviewed by individual event organisers, sponsors and our Regional Council, to identify scope for future topics, presenters and event management improvement.

- CPD digital events - Due to restricted eshot publicity (and evident `screen fatigue`) participation was lower than expected for the summer events. However, with restoration of eshot publicity in September, the autumn replacement digital events, now offered as a whole region rather than an individual hub group event, have attracted regular participation from across our region.
- CSE-SN - Reinvigorate and maintain an active regional student network
- Retired members visits – maintain booking levels for retired members visits (visits cancelled due to Covid -19)
- Governance standards - Consistent attendance, or digital engagement, at Regional Council governance meetings by our regionally elected/co-opted members is expected – and a growth in engagement was evident this year from our regionally elected CIPFA Council members.

Regional membership participation in the April digital Regional AGM (c75 participants) almost matched previous years' live attendances.

Conclusion

Wherever possible, digital events successfully replaced planned live activity after March. We anticipate the remaining digital events planned for 2020 will too. Obviously, our Regional Residential Conference, our NQM Certificate Receptions and our Annual Regional Dinner could not take place this year – but we plan to reinstate those for 2021 in a reviewed format as relevant. Our regional student network and our retired members look forward to reinstating their deferred events too. And we all look forward to PF Live in London 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 live full day Conferences and local events (our hub group meetings) across the region, or whole 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 	<p>Positive feedback from a significant majority of delegates. Maintain hub groups and hosting offers</p> <p>Positive feedback from delegates and sponsors</p> <p>Positive engagement with regional LA employers and NHS networks for developing topical programmes for our regional events</p>	<p>Mix of hired and hosted venues and digital. Some specific values are shown below.</p>	<p>See Plan at Section 5 for our groups - locations and frequencies will be confirmed as the year progresses.</p>

	8. Contact with key Treasurer Society members to create dialogue on key issues and to publicise our regional events (SCT/SLT/ALAT/HFMA)	Ongoing by individual Regional Council members.		
Member engagement, e.g. with students, identifying new members	<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 may now be delivered with minimal budget as part of our review if reduced funds are 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 take place. 5. Bi-annual Retired members 	<p>Positive reader feedback and event enrolments Growth in student participation in events</p> <p>Take up levels and NQM feedback New volunteers engaged</p> <p>Level of retired</p>	<p>£1800</p> <p>£3000</p> <p>Breakeven on £1k</p>	<p>8/10 per year are arranged</p> <p>Programmed for 2021</p> <p>Programmed for 2021</p> <p>Programmed for 2021</p> <p>Programmed</p>

	<p>Group Meetings – usually an organised visit to a place of interest in our region with a lunch arranged.</p> <p>6. Regional Speed 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>member participation</p> <p>Successful mentor/mentee relationships</p> <p>Evidence of successful cross boundary working</p>	<p>spend</p> <p>Sponsor funded launch in 2017 – each event cost is estimated at £900 if not sponsored.</p>	<p>for 2021</p>
<p>Events, local focal point for members and other stakeholders</p>	<p>The 2021 Regional Event Plan (See Section 5)) gives details of type of event, with dates and venues status.</p> <p>As already emphasised, we are already, and will continue to incorporate our current Themes into our 2020/21 rolling Events Plan – which is reviewed and fine-tuned as needed at each Regional Council meeting.</p>	<p>Evidence in content and conduct of events.</p>	<p>£1500 budget to support new events. Most events are planned to break even on approx. £10k total spend.</p> <p>£9250 to direct and administer the delivery of the events programme and to secure</p>	

	<p>We will also support any further consultation proposals for the (originally titled) CIPFA 2020 Project. -</p> <p>We initiated our Regional Inclusion and Diversity Project in September 2020. Initial digital event planned for December 2020.</p>	<p>Continue to offer local workshop venues as requested and invite presentations on the project developments and outcomes in our regional event programmes.</p> <p>Presentations on diversity and inclusion and personal wellbeing in our 2021 events. programmes.</p>	<p>sponsorship through positive relationship management practices.</p> <p>Proposal to seek sponsor support for ongoing programme - £500 for an initial launch presenter in December 2020 (event scoping in progress)</p>	
<p>Communications, newsletters, website</p>	<p>Regular eshots (see above) and our regional website carries event and related information. Regular contributions are submitted to Spreadsheet.</p> <p>We continue to develop our use of social media for promoting events and to stimulate commentary and engagement amongst our members</p>	<p>Regular liaison with marketing team for eshots</p> <p>Evidence of regular and/or growing our regional membership engagement.</p>	<p>Regular eshots (see above), website carries event and related information.</p>	<p>Regular liaison with CIPFA marketing team for eshots</p> <p>.</p>

	<p>(and other interested parties).</p> <p>We successfully initiated digital CPD sessions in 2020. We now plan to offer our future events as a mix of regular digital productions coupled with day/half day live events at key venues around our large region- to keep pace with the changing requirements of our members for CPD and live networking.</p>		<p>Break even as a result of sponsorship, on a turnover of c£10k</p>	
<p>Governance, e.g. local branch meetings</p>	<p>We programme 4/5 Regional Council Meetings annually, plus our Spring AGM.</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.</p> <p>Attendance at CIPFA Annual Conference and planned Regional Forums.</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.</p>	<p>£5500</p> <p>Currently budgeted annually as – £2000 Annual Conference</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>

	<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 2021 conference is currently planned to be 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 to agree how additional costs incurred can be covered without putting additional burden on the Council budget.</p>	<p>Positive participation and engagement in these events</p>	<p>£1500 Regional Forums NB – An annual provision, which will vary dependent on location and travel/hotel accommodation requirements</p>	
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Section 4

Resources

Please provide a summary of your branch's financial position.

Resources	Value (£)	Comments
Opening balance (anticipated for the start of the year)	25,000	
Core subvention (basics to operate branch)	10,000	See note below. The total requirement (ie 2021 bid) is therefore £18,000
Development funding sought	8,000	'Development' Funding is essential to sustain delivery of our planned regional activities (assuming a resumption of live events in 2021)
Income from other activities (e.g. events)	2,000	
Sponsorship	28,000	Achieved as an outcome of annual investment in our Regional Development Project

Other resources (e.g. use of meeting rooms)		Sponsor agreements for use of premises for hosting governance and CPD meetings, including refreshments. More recently, our sponsor digital platforms have supported/facilitated our regional governance and CPD meetings.
Expenditure (related to the activities in Section 3)	52,000	
Expected closing balance	21,000	

Using your earmarked reserves in 2021

Please provide a brief summary of your branch's earmarked reserves. You should detail how you plan to use these reserves to contribute to your activities in 2021.

Resource	Comments
Earmarked reserves	<p>Ongoing use of balances - used for several years to contribute towards the annual £9250 investment in our Regional Development Project. This has resulted in a robust and sustained programme delivery, with clear evidence of successful sponsorship engagement and support, which is critical to delivery of our regional activity</p> <p>Our remaining balances are slightly below the CIPFA HQ recommended level, given the scale of our regional activity and are required to effectively maintain cash flow.</p>

Section 5

Planned activity for 2021 – shows details of planned dates

This schedule shows

- our planned events being delivered digitally to April, after that we intend to offer a mix of digital and live events.
- our current Regional Hub Groups. Our London Division is expected to resume its quasi autonomous status during 2021.

Calendar of activities

CIPFA South East Region - REGIONAL DEVELOPMENT PLAN 2021 SECTION 5 (at October 2021)

Note - Events are currently planned as digital until Easter 2021. The format for later dates will be reviewed at 3 February Regional Council.

<u>2021</u>	Date	
January	6	Regional Digital CPD Event
	21	Regional Digital CPD Event
February	3	Regional Council Meeting - digital
	12	Regional Digital CPD Event
	26	Regional Digital CPD Event
	tbc	East of England NHS FSD Conference (Newmarket)
March	8	PF in Wessex Day Conference (hosted by Hampshire CC, Winchester)
	11	Regional Digital CPD Event
	30	Regional Digital CPD Event
April	tbc	Retired Members' Group Meeting - Clerkenwell (postponed from October)
	tbc	Regional Council
	w/c 19	Regional AGM and Spring Conference - London
	tbc	Regional Digital CPD Event

May	tbc Regional Digital CPD Event tbc Regional Digital CPD Event tbc Regional Hub Group Meetings
June	tbc PF in Kent Day Conference tbc Regional Digital CPD Event tbc Regional Hub Group Meetings
July	tbc Public Finance Live - CIPFA Annual Conference - QE11 Centre, London tbc Regional Council (digital) tbc Regional Hub Group Meetings
August	No Regional Events planned
September	tbc PF in East Anglia Day Conference tbc Residential Autumn School, Reading University tbc Regional Council Meeting tbc Regional Digital CPD event tbc Regional Hub Group Meetings
October	tbc Regional Digital CPD event tbc Annual Pan Accountancy Lunch - London tbc Regional Hub Group Meetings
November	12 Annual Regional Dinner – London Marriot Hotel tbc Annual Regional Forum – host region tbc tbc Regional Digital CPD event tbc Regional Hub Group Meetings
December	tbc Regional Council Meeting tbc Regional Digital CPD event tbc Regional Hub Group Meetings

Regional Hub Groups at October 2020

- 2021 event venues to be confirmed

London Division
Wessex
Thames Valley
Cambridge
Suffolk
Norfolk
Essex
Kent
West Sussex
East Sussex
Hertfordshire

Please submit your plan to Rochelle.Mayner@cipfa.org by **Monday 19 October 2020**.