

Spreadsheet

CIPFA.ORG | NEWS FOR MEMBERS AND STUDENTS

FEBRUARY 2016



CIPFA Birmingham office reopens

after major transformation project to modernise learning facilities

Birmingham's skyline adorns the refurbished CIPFA office interiors

in this issue

[Library Survey reveals fall in visits and loans](#)

[New Years Honours for CIPFA members](#)

[Winners and losers in local government settlement](#)

[CIPFA to develop PFM training in Kosovo](#)

CIPFA

Message from the President

Since the last edition of Spreadsheet, a lot has happened in the world of CIPFA. We've released our annual library statistics, responded to key budget announcements, signed a new Memorandum of Understanding (MoU), launched a financial benchmarking tool and reopened offices in Birmingham. Not to mention celebrated Christmas and New Year!

Towards the end of 2015, CIPFA received a vast amount of coverage for its annual library survey in both national and regional press, as well as radio interviews. CIPFA also gained great traction in the media for its response to the Scottish budget - even making the front page on the Herald. The Institute was also in high demand for the Local Government Settlement. Rob Whiteman was approached for interviews on BBC Radio 4's World at One programme and on Radio 5 Live's drive-time show.

As well as establishing CIPFA as the public finance experts in the UK, the Institute has continued to expand its reputation internationally. I was delighted to sign a MoU with the Society of Certified Accountants and Auditors of Kosovo (SCAAK). Together, we will develop a joint public financial management qualification to increase capacity and capability within the country. The signing ceremony took place in London with myself and

Rob representing CIPFA and SCAAK's president, Shaban Muharremi, and executive director, Ardiana Bunjaku.

CIPFA has also strengthened its working relationship with Grant Thornton by launching an insights and benchmarking platform, CFO Insights, to help finance teams compare costs and performance. It allows finance directors to compare a local authority's income and spend by category as well as the outcomes for that spend within the local socio-economic context. Using the tool, local public bodies will be able to find better ways of managing demand in the future and share best practice.

Improving and developing services is a key aspect of CIPFA's offering and to ensure this the Institute needs up-to-date facilities. I am pleased to announce that our offices and training centre in Birmingham have reopened. The refurbished facility promises to be a hub for students, members and volunteers to come together in a modern and relaxed setting. I am greatly looking forward to visiting in the near future.

Regional Conferences have continued apace and I have recently attended the Wales and North East events. They both contained stimulating programmes supported by quality speakers. They reminded me again of how fortunate CIPFA is to have such a large number of

committed volunteers who give freely of their time alongside busy day jobs to organise these events.

With only five months left of my presidency, I am eager to make even further progress and drive CIPFA's strategy forward. I will also continue to push progress on issues close to my heart, such as: aligning public services, exploring new partnerships to make better use of the public pound, transformation to make services sustainable and training the next public finance leaders to ensure they are both capable and driven while reflecting all the make-up of society. I am confident that with your help, the Institute can drive change and improve public financial management.

Finally on behalf of both myself and the whole Council, I wish you all a healthy and fulfilling 2016.



**John Matheson,
President**



contents

News 2-7

Institute matters 8-13

Members news 14-17

Regional news 18-21

Student news 22-24

Events 25-26

Who's who at CIPFA 27

Keeping up with CIPFA

You can now join us on [LinkedIn](#), follow CIPFA on [Twitter](#), or 'like' us on [Facebook](#).



Copyright © CIPFA 2015. Permission is granted to reproduce for personal and educational use only. Commercial copying or redistribution in any form is prohibited.

Spreadsheet

77 Mansell Street, London E1 8AN
T: 020 7543 5600 E: corporate@cipfa.org

Editor

Kathryn Chellew

We welcome your feedback on Spreadsheet. Please send your comments and suggestions for future articles to Kathryn.Chellew@cipfa.org

Library survey uncovers £50m funding cut

Council-run libraries across Britain suffered a budget cut of £50m over the last year, and a drop in visitors and staff, according to CIPFA's annual library survey.

However, a surge in the number of volunteers shows how valued libraries are to communities.

And there was good news for the North West and East Anglia - the most visited library was Central Manchester, (1.3m visits) while Norfolk & Norwich Millennium loaned the most items (1m).

Key findings include:

- Number of libraries fell by 2.6% in one year, from 4,023 (2013-14) to 3,917 (2014-15)
- Total visits dropped 3.9%, from 276m (2013-14) to 265m (2014-15)
- Total funding fell by £50m, from £0.99bn (2013-14) to £0.94bn (2014-15)
- Full-time paid library staff fell by 3.8%, but volunteer numbers rose by 18.7%.

Rob Whiteman, Chief Executive of CIPFA, said: 'Once more, our annual



Manchester Central Library

library survey makes for grim reading. Cost cutting measures continue to hit unprotected services hard and fewer people are using public libraries. Yet there is some hope. Volunteer numbers have nearly doubled over the past five years. Tens of thousands of people are now giving their time to make sure these precious resources survive.'

The results of the survey contribute to a trend of steady decline since 2010. Gross expenditure has been reduced by more than £180m (16%) over the course of the last Parliament. Over the same period, visits have fallen by 13.6%.

Read the survey results [online](#).

Training government accountants in the Cayman Islands

The Cayman Islands has made good progress in turning round its financial performance thanks to the efforts of CFOs, its Audit Office and a strong training programme, which CIPFA has been involved in.

Alastair Swarbrick, the former Auditor General, described the state of the government's financial statements as "appalling" in December 2010 in his first report. Five years on, there has been significant improvement, but huge challenges remain to increase the professionalism of the finance function

within government, including providing ongoing professional development.

CIPFA's Government's faculty has been involved in training members of the Cayman Islands Society of Professional Accountants (CISPA) over the last three years. The programme has focused on the role of the chief financial officer and good governance, based on CIPFA's good practice guide developed with IFAC. There has been progress in providing greater accountability and transparency in government financial reporting, which will help to turn

around the finance function in the public sector, by improving decision-making and performance.

The Cayman Islands government now has a strong team of CFOs who have benefited from the training provided to shift the focus away from purely operational matters towards quality control and strategy.

Copies of the [Role of the Finance Officer](#) are available to order from CIPFA's Publications website:

Winners and losers in local government settlement

CIPFA gave a cautious welcome to the local government settlement, announced on 17 December 2015.

CIPFA Chief Executive, Rob Whiteman said:

‘There will be winners and losers in this local authority settlement. Top-tier local authorities are set to benefit as high-demand critical services, such as social care, receive welcome direct support. However, it is likely that District Councils will find a greater squeeze on their budgets as the new homes bonus is reduced by around £800m between now and 2019-20.

‘We welcome the move to localised funding, which will give local people more power to set priorities for their communities, but there is still a long way to go.

‘However, replacing central government funding with fully retained business rate revenues introduces real risk to council finances. It is something of a gamble for many vital public services - as the assumptions underpinning greater localisation are that the economy continues to grow and a much greater number of new homes are built, which recent experience shows is anything but certain.’

CIPFA’s analysis also revealed a surprise redistribution of Revenue Support Grant funding that will leave a number of local authorities facing a serious shortfall. Our Local Government Adviser, Sean Nolan, exposed the findings in an article for the MJ and lamented the lack of engagement with the sector, which has left many councils unable to plan effectively. CIPFA has repeated these points in its formal response to the government’s consultation.

CIPFA responds to Scottish budget

With the announcement of the Scottish 2016-17 budget on 16 December, CIPFA’s Head of Devolved Government, Don Peebles was quick to issue a statement which was included on the front page of the Herald newspaper.

Don Peebles said:

‘This is an historic budget. For the first time ever, Scotland has set its own income tax.

‘Even though Scots will pay no more or less, it is a locally set rate of 10p, which will generate £4.9bn and may vary in the future from the UK rate.

‘The NHS gains a real terms increase of 6.5%. However, local government loses out with a real terms reduction in funding of more than 7% over one year.

‘The budget also signals immediate tax reform. It proposes assigning income tax receipts to local government.

‘CIPFA welcomes this swift response to the report of the Commission on Local Tax Reform.’



Don Peebles, CIPFA’s Head of Devolved Government

Better Care Fund tied up in red tape

A joint CIPFA and Healthcare Financial Management Association (HFMA) report showed that the Government’s £5.3bn Better Care Fund, designed to get health and social care services working together, is being held back by too much red-tape.

The Better Care Fund – Six Months On found that the fund had begun to produce improved working relationships, but called for more to be done to ensure overall success.

Rob Whiteman, CIPFA Chief Executive, said: ‘Government must do more to support effective governance of the Better Care Fund. This is a real opportunity to get health and social care working together – focusing on prevention before cure – saving lives, time and money. But its administration must be simplified if it is to deliver a meaningful impact.’

The report is based on a survey of NHS bodies and local authorities representing almost a third of BCF sites.

Many of the 48 organisations that responded, representing £3.6bn of the total fund, said they had already experienced a positive improvement in dialogue across local public sector bodies and investment in innovation which might not have happened otherwise. But they complained about complicated governance and unrealistic government expectations.

In the response to the survey results, HFMA and CIPFA have drawn up recommendations for the government to enable full integration of health and social care.

Read the full [press release](#) online.

New Years Honours for CIPFA members

Congratulations to our members whose outstanding public service has been recognised in the 2016 New Years Honours list.

An OBE was awarded to Lynn Brown, Executive Director for Financial Services at Glasgow City Council.

Jane Tomkinson, Chief Executive of Liverpool Heart and Chest Hospital NHS Foundation Trust, also received an OBE for services to NHS financial management.

Michael Whitehouse, the Chief Operating Officer at the National Audit Office, received an OBE for services to public sector audit.

David Clarke, former Treasurer to West Mercia and Warwickshire PCCs, received an OBE for services to policing finance.



Lynn Brown, Executive Director for Financial Services at Glasgow City Council



Jane Tomkinson, Chief Executive of Liverpool Heart and Chest Hospital NHS Foundation Trust



Michael Whitehouse, the Chief Operating Officer at the National Audit Office



David Clarke, former Treasurer to West Mercia and Warwickshire PCC

Launch of CIPFA Fellowships

A new category of membership - 'Fellowship of the Institute' – has been launched, in recognition of professional seniority. This new privileged status is now open to CIPFA members of good standing with at least ten years' continuous service.

Fellowship of CIPFA will enable you to belong to an exclusive cohort of highly experienced public service finance professionals, signalling your commitment to public services and allowing for privileged interaction with CIPFA and your peers. Those accepted will be entitled to use the designation FCPFA (Fellow Chartered Public Finance Accountant).

Other exclusive benefits include:

- Enhancement of your professional status - CIPFA Fellowship demonstrates a high level of experience as a public finance professional and signals commitment to the profession.
- An engraved CIPFA Fellows Plaque and formal certification of your new status.
- Exclusive invitations to Fellows' events including our Annual Fellows' Reception, hosted by the President - a great opportunity to connect with your peers, share ideas, make new connections and discuss emerging issues.
- Access to our online Fellows' Forum - consult with other Fellows on key public finance and accounting issues, as well as receiving exclusive CIPFA briefings in a private online forum space.
- Being part of our professional advocacy network, influencing developments in public finance by contributing to CIPFA consultations and policy discussions.
- An annual Fellows' Digest of the most significant articles from Public Money and Management, CIPFA's leading academic journal.

After successful application and payment of £100, you will receive formal certification of your new status and full details of your special benefits. In future years this payment can be collected annually with your CIPFA membership renewal.

Find out [how to apply online](#) - we look forward to welcoming you as a CIPFA Fellow.

CIPFA publishes First Wales Balance Sheet to boost financial transparency

The first ever comprehensive study of the net financial position of devolved public sector services in Wales was published in November.

CIPFA's [Wales Balance Sheet](#), compiled using the financial statements of devolved public sector bodies, estimates that the country currently owns or controls around £42bn worth of assets and £23.6bn in liabilities.

Wales' assets include £38.5bn long term assets including £15bn of 'network' assets such as roads, £15bn of assets held by local councils and £2bn worth of student loan debts.

The Welsh public sector also controls £3.5bn of current assets including short-term investments, inventories and available cash or cash equivalents.

The Institute has also calculated that Wales owes £23.6bn in liabilities, the majority of which is made up of public service pensions - accounting for more than £14bn. This is split between the police (£7bn), local councils (£6bn) and fire and rescue authorities (£1.5bn).

www.cipfa.org/about-cipfa/press-office/latest-press-releases/wales-balance-sheet



CIPFA and Grant Thornton launch financial benchmarking tool

CIPFA and Grant Thornton have jointly launched an insights and benchmarking platform to help finance teams compare costs and performance.

Called CFO Insights and based on Grant Thornton's Place Analytics platform, the subscription-based service brings together data relating to the financial performance of local authorities across England, Scotland and Wales.

It allows finance directors to compare a local authority's income and spend by category as well as the outcomes for that spend within the local socio-economic context.

CIPFA chief executive Rob Whiteman said: 'Finance directors are on the frontline tackling the huge challenges that face public service. CFO Insights enables local public bodies to compare costs, outcomes and other indicators, so that they are able not only to work on what has happened in the past, but also to find better ways of managing demand in the future.'

Grant Thornton partner Phillip Woolley added that high performance in public services 'can only happen through better insight and understanding that is based on the transparency of data and the sharing of best practice throughout the UK'.

All change for business rates

The recent check challenge and appeal consultation on business rating list entries from the Department for Communities and Local Government closed on 4 January so CIPFA's Local Government Faculty hit the ground running on the first day back from the Christmas break. Thoughts of pudding and presents were replaced with policies, penalties and paper work to meet the deadline.

Business rates are a substantial financial consideration for local government. In 2013-14 local authorities collected £22.6bn in non-domestic rates. Ratepayers can appeal the business rates payable and local authorities must set aside money in case refunds are required.

The consultation is part of the ongoing business rates review. It is considering a new appeal process to make the system more efficient and streamlined. Resolving cases correctly and as quickly as possible makes good financial sense.

CIPFA Policy Adviser Joanne Pitt said: 'While we welcome the changes, we have said that some of the time limits look to be rather generous. Communication is going to be important during those more difficult cases so that local authorities have sufficient information to make good well informed financial decision.'

Throughout 2016, business rates will be a central theme for CIPFA and a National Business Rates conference is already being planned for December 2016. Please watch out for details on the [CIPFA Benefits and Revenues Service website](#).

CIPFA to develop PFM qualification in Kosovo

CIPFA is developing a joint public financial management (PFM) qualification in Kosovo with the Society of Certified Accountants and Auditors of Kosovo (SCAAK).

The Memorandum of Understanding was signed in London by CIPFA's President John Matheson, CEO Rob Whiteman, SCAAK President Shaban Muharremi and Ardiana Bunjaku, Executive Director, to create a formal basis for co-operation and collaboration between the institutes.

Existing SCAAK members - certified auditors working in the public sector in Kosovo - will be eligible to become CIPFA members. Both parties are now developing and implementing a co-branded professional training



Shaban Muharremi, SCAAK President is pictured (centre-left) shaking hands with John Matheson - CIPFA President, flanked by (left) Rob Whiteman, our CEO and (right) Ardiana Bunjaku, Executive Director, SCAAK

programme for public servants in Kosovo - in the Albanian language - and a new generation of interested students in Kosovo to become professionally qualified members with both SCAAK and CIPFA.

The joint PFM qualification incorporates 12 exams covering topics of relevance

in the public sector context including Management Accounting and Budgeting, Public Sector Financial Reporting, National Laws, Audit and Risk Management, Public Finance and Information Systems and Governance.

CIPFA increases its international reach

CIPFA has its sights set on North America in 2016, building on the successes of 2015 for international growth.

New training agreements were signed with accountancy bodies in Pakistan, Nigeria and Kosovo, and a DfID-funded training initiative was launched in Uganda between ICAS and CIPFA to strengthen public financial management.

Added to this, there was a massive increase in the number of students from overseas, helping CIPFA to increase its global reach and reputation.

In December 2015, Chair of CIPFA Development, Alan Edwards travelled to Washington to speak at the International Consortium on

Governmental Financial Management (ICGFM) conference. He addressed the need for a Global PFM profession if the world is to deliver the new sustainable development goals.

The conference drew a worldwide audience of politicians and government finance staff, and Alan's speech prompted several approaches about partnerships on overseas projects, including an international development consultancy wanting to bid with CIPFA for a large USAID project.

Our training programme in Somalia was a case study at the conference, and was so well received that we have been asked to do a webinar on it for a Washington ICGFM lunch session in April.

Looking to the year ahead, Alan Edwards said:

'America is a market we really would like to break into with a global training partner.

'We are in discussions with a Canadian supplier of government accounting systems and a US Association of Government finance staff.

'The US is, of course, full of competitors and multiple specialist bodies and credentials but there is the potential for collaboration in a few well-defined areas.'

FM Model travels down under

The CIPFA Financial Management (FM) Model has been exclusively licensed to CPA Australia (Certified Practising Accountants) in Australia and New Zealand, to drive forward better public financial management.

In 2004, led by a group of senior practitioners, CIPFA developed the FM Model – a self-improvement diagnostic tool to help public sector organisations measure themselves against best practice and create a clear action plan for improvement. With this partnership, CPA Australia is now able to offer public sector organisations an internationally recognised framework which measures strengths and identifies opportunities for efficiency gains in financial management.

Neil Vincent, Head of Training and Consultancy at CIPFA, said: 'For the Australian and New Zealand Market, the FM Model was an obvious choice. Nobody in the world has a process like it and a framework that can gauge an organisation's financial health better. Putting this model at the centre of strategic decision-making makes FM better across the whole business and for all stakeholders. It helps to create a focused action plan to make the biggest impact across the whole organisation, not just back office finance functions.'

Work is well underway on the development of version 4 of the FM Model, updating the best practice framework to reflect the current circumstances and upgrading the functionality with improved reporting and outputs for self-assessment.

www.cipfa.org/services/advisory-and-consultancy/financial-management-model/financial-management-international

Accountants encouraged to 'Flag it up' if money laundering is suspected

Money laundering and fraud is a serious issue. Organised criminals target accounting professionals to carry out money laundering, however many of us think that it'll never happen to us.

CIPFA is supporting a new awareness campaign developed with the Accountancy Affinity Group (AAG), Law Society and Solicitors Regulation Authority (SRA). The 'Flag it Up' campaign aims to help accountants and solicitors spot the 'red flags' which could indicate criminal activity:

- Are there inconsistencies in the information provided?
- Is the amount of funds and their source unusual?
- Are there discrepancies in transactions?

If you're suspicious, remember to submit a confidential suspicious activity report (SAR) to the National Crime Agency.

Find out more about the campaign and explore the resources available on the [CIPFA website](#).

When it comes to bribery, prevention is better than cure

To mark the launch of its [Anti-bribery and Corruption e-Learning Package](#), the CIPFA Counter Fraud Centre published a list of behaviours that should be avoided when dealing with contractors, developers and customers.

Bribery is not always obvious and can sometimes be cloaked in goodwill, making it easy for individuals and organisations to fall foul of the UK Bribery Act 2010.

CIPFA Counter Fraud Centre supports global campaign to disrupt corruption

On 9 December 2015, the Centre joined governments, the private sector, NGOs and individuals around the world to help raise awareness of how fraud and corruption undermines democracy and the rule of law on International Anti-Corruption Day. Corruption and fraud are not limited to developing countries and in the UK they are often used to support organised crime, terrorism and other threats to security.

Rachael Tiffen, Head of the CIPFA Counter Fraud Centre, said: "Bribery and corruption are hot topics for discussion in the UK, and we're pleased to lend a voice of support to the UN's International Anti-Corruption Day. One of the benefits of this national awareness day is that it... [enables] individuals, businesses and the public sector alike to express their views on how they can be better supported to manage corruption risks, what defences do they need to have in place, and how to build a robust counter-fraud culture."

Find out more about the campaign and CIPFA's involvement on [the website](#).

The list includes avoiding giving out your personal mobile number and not meeting informally outside working hours, away from your organisation's premises and without formal approval.

You can read the full list on the [CIPFA website](#).

Institute matters

Creating value through integrated reporting

Speaking at a recent International Integrated Reporting Council/CIPFA pioneer network event, CIPFA's Head of Governments Faculty, Gillian Fawcett argued the case for embedding the integrated reporting framework <IR> into business strategy, outcomes and processes.

Gillian said: 'Creating value is at the heart of the <IR> reporting framework and the spotlight is on it like never before. There is an increasing desire to focus on long-term financial sustainability that goes well beyond the short-term political cycle together with dealing with issues of transparency and accountability when spending public money. Integrated thinking and integrated reporting can help organisations to focus on the long-term.'

'Financial data on its own doesn't tell the whole story of how an organisation creates value. Citizens are demanding to know more about the social and environmental impacts of policy decisions, as well as the fiscal implications - for example, young people making job choices based on whether organisations are addressing sustainable development. Also, public entities are looking for new ways to improve efficiency and

effectiveness. A better understanding of the interrelationships of the <IR> framework's six capitals (human resource, intellectual, natural, infrastructure, financial, social and relationship) and their contribution to their organisational strategies can help them to deliver value-for-money.

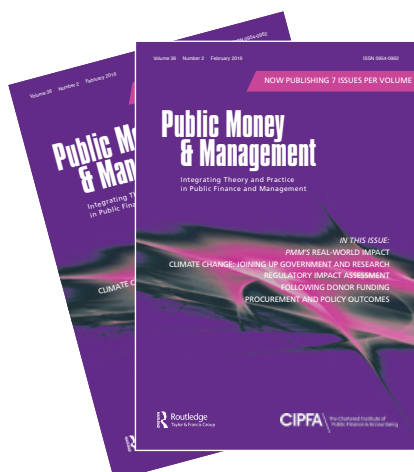
'But we should also be aware of the distinctiveness of the public sector compared to the private sector before applying the principles of <IR>. Governance and accountability are not homogenous across the public sector. The role of taxpayers is also different - an investor can choose to disinvest in a failing company whereas a taxpayer cannot stop paying taxes when public services are poor. Concerns about ethics and fairness also come into play in the public policy space. The value creation process is also different and often defined by the complexity of the services delivered, such as health and social care.

'Despite these sectoral differences, integrated thinking and reporting can help public sector managers develop a better understanding of how <IR> supports joined-up decision-making and provides a structured management approach to creating value.'



Gillian Fawcett

The <IR> framework helps to give clarity about what you are trying to achieve and identifies process gaps - it makes a clear distinction between outcomes and the tools needed to achieve goals and most importantly focuses on defining outcomes. However, measuring value can also be a tricky business, particularly if you haven't defined value and how you are going to measure it at the outset. It is critical to have clarity at the outset and consensus by all appropriate stakeholders about what you are attempting to measure.'



Expert reviewers needed for CIPFA's finance journal

Specialist finance journal [Public Money & Management](#) (PMM) – available free online to members - is always in need of expert reviewers for submissions.

Each paper submitted to us is checked by at least one academic and one practitioner to maintain our reputation for quality, relevance and, with input from practitioners, real impact.

A good percentage of our submissions are rewritten following referees' comments and guidance, particularly from early career researchers.

If you would like to join our list of referees, please send your areas of expertise to Dr Sarah Cooper, PMM's editorial assistant: S.G.L.Cooper@exeter.ac.uk.

Highlights from latest Council meeting

At its meeting on 17 December 2015, CIPFA Council was delighted to approve the co-option of Ann Beasley and Ken Finch as members. Ann is Director General of Finance at the Ministry of Justice and Ken is the Strategic Director for Democracy and Environment at Conwy County Borough Council.

A report on the successful pilot of e-assessment for two examination modules was reviewed, and further enhancements will be discussed with employers and students in 2016.

Council has created two Task Forces. The UK in Europe Task Force has already commissioned research and set up a calendar of events. A forward timetable for the work of the Global Cities Task Force will be drawn up in 2016.

Council also considered proposed revised procedures for setting membership fees and received a presentation from Penna, who run the CIPFA-Penna recruitment service.

There was an update on the development programme, and on the recommendation of the CIPFA Board, Council approved the Business Plan for 2016–2018.

On behalf of Council, the President thanked Ian Ball for his contribution and congratulated Ian Carruthers on his appointment as Chair of IPSASB.

The minutes of the meeting have been published in the [Members' Secure Area](#) of the CIPFA website.

Inaugural report on CIPFA's work with devolved governments

CIPFA's Devolved Government Faculty has published its first report summarising its key achievements and activities in Scotland, Wales and Northern Ireland in the final quarter of 2015.

In both Northern Ireland and Wales, public sector balance sheets were published and launched at the national conferences in the autumn. These documents identified for the first time the scale of the public sector-wide assets and liabilities for the devolved administrations.

In Scotland, the Annual Governance Conference was held in December 2015, a key feature of which was the Governance Mark of Excellence. This new product from CIPFA, aimed at measuring the extent to which public bodies meet governance standards, was described in detail to delegates by representatives of the Scottish charitable body Includem, who were the first ever recipient of the award.

Looking ahead to 2016, planning is underway for the CIPFA Scotland Annual Public Finance Conference which will be held on 16-18 March, with the proposed theme 'entrepreneurial leadership in a time of austerity: leading public services to success', and will include the annual public finance awards.

Elections will take place in all three devolved administrations in May 2016 and CIPFA will be publishing manifestos for each of the territories in the spring.

Health and Integration Faculty joins the debate

Against the national background of increasing pressure on the NHS, the Health & Integration Faculty has contributed substantially to the relevant policy debates.

The Better Care Fund Survey, published jointly with Healthcare Financial Management Association (HFMA), argued that red tape must be minimised moving forward and generated considerable media interest. Although the full detail is awaited, the signs are that the Government has indeed responded by simplifying the BCF rules for 2016-17.

The faculty's analysis of the Comprehensive Spending Review, which funds both health and social care (though arguably not enough), found that it failed to maintain critical support to both. An Adult Social Care Risk Tool was launched jointly with the Association of Directors of Adult Social Services (ADASS) to provide a framework for assessing underlying financial risks when setting social care budgets. The Insights paper *Let's Get Together: Integrating Health and Social Care*, published in October, set out roundtable lessons and recommendations on integration, devolution and systems leadership.

CIPFA is also making progress to support finance professionals in health and social care, running two major conferences, piloting a programme of training for integration, and winning the Welsh NHS graduate training scheme to add to the English national scheme where the initial CIPFA cohort has completed its first year.

[CIPFA Thinks – Health](#) web pages and the new monthly [Health newsletter](#) provide further details.

Birmingham office reopens

CIPFA’s Birmingham office reopened in January after a total face lift by LGM Interiors to provide a new office and training rooms, and replace data cabling, carpets and lighting.

Work was carried out throughout December and early January to reduce the impact on students’ studies, and the refurbishment will provide modern, high-tech training rooms to improve the teaching, learning and assessment facilities for CIPFA education and training courses in the future.

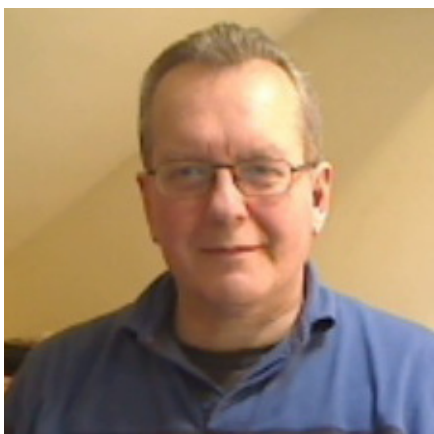
The 3,750 sq ft office is on the sixth floor of 154 Great Charles St, Birmingham, B3 3HN.



The learning environment before...



...and after the refurbishment



Retirement of Roman Haluszczak

Roman Haluszczak retired from CIPFA at the end of January due to ill health. Andy Perrin pays this tribute.

‘Roman joined CIPFA 13 years ago and was charged with two colleagues (Head of Networks Cliff Dalton was one of them) with building a finance advisory network. That network now generates £1.5m a year for CIPFA and provides invaluable guidance to well over a thousand public sector delegates every year.

‘Throughout his time with us, however, Roman has of course also made a significant contribution much more widely across CIPFA. He was part of the fabric and I know he will be missed by colleagues and network members alike.

‘I’d like to take this opportunity on behalf of CIPFA and colleagues to thank him for all his hard work and contributions during his time here. His legacy lives on.’

CIPFA backs good governance in Northern Ireland

At a time of significant and sustained resource constraint in Northern Ireland's public bodies, effective governance has never been so important.

In response, CIPFA has teamed up with the Chief Executives' Forum, the Chairs' Forum and Ulster University to identify a series of workable, practical suggestions to improve the corporate governance of public bodies in the Northern Ireland public sector.

At CIPFA Northern Ireland's Annual Governance Conference in Belfast last November, Dr Gary Martin of the University of Glasgow and Tony Wall of Ulster University presented some of the emerging findings of the work. The research identified areas where boards were least effective, such as:

- the role of the board in increasing citizen awareness of public body activities
- encouraging ongoing CPD of board members
- taking a structured approach to succession planning
- the use of technology in supporting board processes.

The research also highlighted areas where boards were most effective, such as promoting effective working relationships with executive management, working to agreed deadlines and fostering a culture of constructive challenge.

Overall, this work aims to inform policy and good governance practice for Northern Ireland's public bodies and use the findings as the basis for discussion amongst CIPFA members, members of Chief Executives' Forum and Chairs' Forum as well as central government and key stakeholders.

Free online finance journal for members

Respected finance journal Public Money and Management (PMM) was launched by CIPFA over 30 years ago, and is now available free to members.

Through themed issues and papers, it aims to contribute to the debate on how to manage and modernize the public sector in the face of rapid retrenchment, cutbacks and rising expectations.

Do log on regularly to [read the latest articles and papers](#).

New themes due to be published in coming issues include:

- international (public sector) accounting
- managing and accounting for sustainable development across generations in public services
- public sector reforms and workplace ill-treatment

Check out other learning materials available free to you as members through [Management Direct](#).

Governors needed for Catholic high school

All Hallows RC High School in Salford is recruiting foundation governors to share their analytical and strategic financial planning skills with the governing body.

Governors oversee the school's development by acting as a critical friend, working strategically and holding the school to account. Without these volunteers, a school cannot effectively drive school improvement and deliver the best possible standard of education.

Action under CIPFA's Disciplinary Scheme

The Institute's independent regulatory committees have taken the following actions in relation to Institute Members / former Members: Mr Thomas Bowden

After a hearing held on the 26 October 2015, the Disciplinary Committee determined to expel Mr Bowden from the Institute in respect of him and/or his company, holding out as providing or providing accountancy services, including statutory audit, to members of the public when he had advised the Institute he was not working, he and/or his company were not authorised to undertake statutory audit, and he was not registered to the Institute's Practice Assurance Scheme (since discontinued) and did not hold a Practising Certificate.

Fuller details can be seen [online](#).

Prospective governors would need to be practising Catholics, and attend two to three meetings per term, but no prior knowledge of school management is required.

Please contact Jenny Gregory on T: 0161 921 1900 or E: jenny.gregory@salford.gov.uk.

CIPFA-Penna Talent Spot

Let's talk retention

Julie Towers, Managing Director,
Penna Recruitment Solutions

The public sector has endured some difficult years – pay freezes, reorganisations, redundancies etc. But with employment figures creeping up, we're once again focusing on recruitment. Which should also mean we are focusing on retention.

With employee turnover levels on the increase and a surge in demand for talent, particularly in finance – it's not only prudent to look at our retention strategies, but essential. Tough times can create false loyalty through fear. But what happens when there is choice and more money on offer and the private sector calling?

The best retention is done at grass roots through effective management, through review, appraisal, motivation, support and development. Exit

research continues to tell us that people join organisations but leave managers; and it informs us about the true cost both in £'s and opportunity of recruitment and retention. How is your organisation performing?

Those organisations who've put the effort in over the last five years into building strong employer reputation, employee experience and engagement – will now be reaping the rewards; both in their recruitment and in their retention performance. But for others, it's back to basics. Recruitment is essential. But so is retention if you want those hires to stay. HR has a big role to play in demonstrating the £ value of investing in on-boarding, engagement, competitive terms and conditions and talent management. Perhaps finance could help them? Our data tells us that the investment is vital, through good times and bad.



People in Public Finance



Julie Towers, Managing Director,
Penna Recruitment Solutions



Kevin Bartle, Interim Director of Finance at
Royal Borough of Kensington and Chelsea

On the move

Kevin Bartle has recently been appointed Interim Director of Finance at Royal Borough of Kensington and Chelsea.

He was previously Assistant Director of Finance (Deputy CFO) at London Borough of Haringey for ten years following an early career with Bedfordshire County Council where he rose to be Chief Financial Officer.

Gloucestershire County Council have appointed Paul Blacker as Head of Financial Management.

Paul leaves his current post as Chief Financial Officer at Hutt City Council in New Zealand and will take up his post in Gloucestershire during early Spring.

About CIPFA-Penna

- CIPFA and Penna's new enhanced partnership continues to reap improved rewards for CIPFA's members.
- CIPFA-Penna has expanded its offering to make an even bigger difference to public services and the people that work in them.
- CIPFA-Penna covers three areas of organisational life: recruiting the right talent, developing people to fulfil their potential and managing career transitions when staff move on.
- The profits of the new partnership continue to fund improving the Institute's offering to its members.

For more information, please visit:
www.cipfa.org/services/recruitment/cipfa-penna

Major changes agreed to improve the LA Accounting Code

The CIPFA/LASAAC Local Authority Accounting Code Board (CIPFA/LASAAC) has approved the [2016/17 Code of Practice on Local Authority Accounting in the United Kingdom](#) for issue. The changes introduced by the Code will improve the effectiveness of local authority financial reporting.

Changes under the Telling the Story review are principally:

- allowing authorities to report performance according to the way they are managed rather than a standardised service analysis
- a new analysis which will bring together the funding and accounting performance frameworks in a way which is accessible to the users of the financial statements.

In addition, local authority highways networks will be measured at depreciated replacement cost instead of historical cost, in line with the methodologies specified in [CIPFA's Code of Practice on Transport Infrastructure Assets](#) (Transport Code).

CIPFA has issued the first of a series of Briefings in this area which can be found on the [Highways Network Asset](#) section of the website.

CIPFA/LASAAC has also decided that the highways network asset is defined as a single asset. This has implications for district authorities who are not expected to have a highways network asset. CIPFA Technical Enquiry service has published a [Frequently Asked Questions](#) webpage to provide more details.

Lynn Pamment, Chair of CIPFA/LASAAC, said: 'These changes see the culmination of CIPFA/LASAAC's work of improving information including the presentation of this information in local authority financial statements, in a way that is meaningful and useful to their users and stakeholders. We will continue to strive for best practice in both these areas.'

The [Telling the Story: Improving the Presentation of Local Authority Financial Statements consultation](#) aimed to ensure the Code met the needs of local authorities and the users of their financial statements. Local authorities were concerned that their financial statements didn't reflect their organisation or how financial performance was managed, and feedback indicated that the proposals would improve accountability, be more transparent and follow LA performance frameworks.

Your code board needs you - help develop local authority accounting

The CIPFA/LASAAC Local Authority Accounting Code Board has one vacancy for a representative from local authority financial accounts preparation in England.

With responsibility for the development of the Code of Practice on Local Authority Accounting in the United Kingdom, the Board plays a key role in local authority accounting.

CIPFA/LASAAC usually meets three times a year. Meetings normally alternate between London and Edinburgh.

As well as attending meetings, CIPFA/LASAAC members are expected to review papers including drafts of sections of the Code circulated between meetings.

If you are interested, please send your CV and covering letter explaining your interest in the role to Sarah Sheen, Secretary to CIPFA/LASAAC, CIPFA, 77 Mansell Street, London, E1 8AN, E: sarah.sheen@cipfa.org by **1 March 2016**.

Members news

Welcome to new members

A warm welcome to our new members who have joined CIPFA in the past few months.

May we wish you a long and prosperous career. Don't forget that as a **CIPFA Member** you are a chartered public finance accountant and can use the designation **CPFA**.

Richard Shirley
Manchester City Council

Catherine Murphy
Westminster City Council

Joseph Campbell
Bedford Borough Council

Sharon Mary Macalister
Argyll and Bute Council

Jenny Clare Hann
Cancer Research UK

Christopher Anthony Kelly
Wirral Council

Sean Cremer
Aberdeen City Council

Oxana Druta
World Bank

Hussein Alanezi
Newham Council

Lynn Marie Goward
South Wales Fire & Rescue Service

Donna Louise Healy
Dartmoor National Park Authority

Nicola Maslin
London Borough of Lewisham

Pearse Rice
Northern Ireland Housing Executive

Elaine Portess
London Borough of Hillingdon

Abigail Emma Sheehan
Cheshire East Council

Andrew Robert Turner
Leeds City Council

Richard Michael Wheeler
University of Winchester

Rachel Jane Bailey
Hampshire County Council

Caroline Elizabeth Heyworth
Leeds City Council

Call for seafaring accountant adventurers

Fancy six weeks on the high seas? A TV film company is looking for a finance professional to join a crew sailing across the Pacific.

The project will retrace the steps of a famous voyage across the Pacific Ocean in a small replica boat. There will be ten crew on board with various skill sets including at least one fully qualified ocean yacht master.

This is an adventure/survival series in the tone of Channel 4's The Island and will test successful applicant's mental and physical endurance to the maximum. This will require around 4-6 weeks in August this year.

If you're interested or know someone who might be, email casting@windfallfilms.com or visit www.windfallfilms.com

Members news

Profile Duncan Judd, Head of Membership

CIPFA has appointed Duncan Judd as the new Head of Membership to develop strategies for member development in the UK and internationally and to develop the CIPFA member offer and support our members.

Duncan has worked for various membership organisations, most recently the Organisation for Professionals in Regulatory Affairs (TOPRA), where he was Head of Membership tasked with developing membership services, IT, benefits and leading a team in creating a strong member-focused selection of special interest groups and local networks on different subjects within pharmaceuticals.

At CIPFA, Duncan will be responsible for leading a team of membership managers and administrators to develop and ensure that members' services are delivered to a high standard and that the membership offer is reviewed and developed. One of the main focuses is to grow membership nationally and internationally and undertake analysis and report trends in the membership growth.

Duncan said: 'I look forward to building a strong team and ensuring membership growth is steady, services are efficient and timely and strategies are in place to support all our developments for the future.'



Duncan Judd

Retirement of Gordon Ferrier

Gordon Ferrier has retired from his post as Head of Global Membership.

Gordon's career with CIPFA spanned two periods. He was the founding head of CETC Scotland from 1990-1998. Having set up and led the centre successfully for eight years, Gordon managed its transition into Napier University, before taking up a career as an independent PFM consultant.

In 2005 Gordon returned to CIPFA as an Assistant Director in the then fledgling international directorate. He was instrumental in ensuring the development of CIPFA's role and influence outside the UK and in helping to ensure that international responsibilities became assimilated into the work of all CIPFA departments, as is now the case. In September 2014 Gordon took on the role of Head of Global Membership, leading the development

of the membership team as CIPFA began to grow its international membership significantly.

Although Gordon has now left his full-time role with CIPFA, he will work with us as an associate, building on CIPFA's relationship with UN bodies around the world, which he was instrumental in establishing.

'I've been privileged to have worked with a number of the very good people who have committed themselves to CIPFA's work over the years,' Gordon said in his leaving speech. 'It has been particularly satisfying to have seen so many students and other PFM staff around the world increase their work and life opportunities through CIPFA's qualifications schemes. That has been a very rewarding experience for me, and one that I intend to continue in the future in a number of ways.'



Gordon giving a presentation to delegates from Nigeria in 2011

Member focus

Alastair Swarbrick, Senior Policy Advisor – Public Finance and Audit, SIGMA (Support for Improvement in Governance and Management)

Alastair's career as a CFPA started in Scotland at the Scottish Office, and has taken him to Paris via London with the National Audit Office, and the Caribbean where he was Auditor General of the Cayman Islands. He has recently started his new role at SIGMA.

'I studied with CIPFA at CETC Edinburgh between 1992 and 1995, and was taught by Gordon Ferrier. I had considered a career in accountancy when at university, but was unsure which direction I wished to go. Ultimately, I found the opportunities and diversity of the public sector to be more interesting and rewarding, although I must admit I didn't expect to spend the next 25 years in public audit!

'In July 2010 I became Auditor General of the Cayman Islands, where I was also a member of the Anti-Corruption Commission and a Director of the Auditor Oversight Authority. I had five interesting and challenging years there, working to hold the Caymanian government to account, trying to improve governance and financial management. It was an interesting working environment with significant challenges - I issued numerous adverse opinions and disclaimers on the financial statements of government and its various entities, definitely something I hadn't experienced in the UK – and dealt with interesting cases of fraud and corruption, and attempts by politicians to undermine the work of the my Office.

'During my time in Cayman I also got involved with the development of the public audit profession regionally with CAROSAI, and also internationally with INTOSAI and the INTOSAI Development Initiative. This led me, after 25 years in public financial management and audit, to look for a new challenge that used my

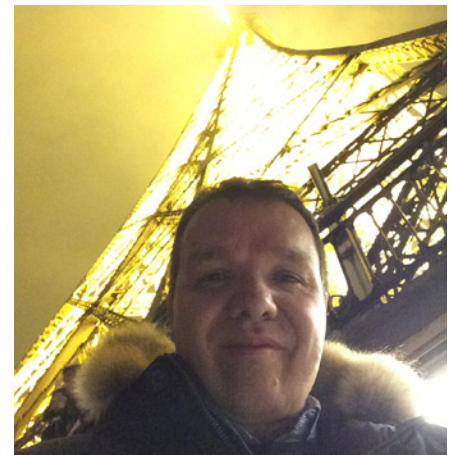
skills in a development context. The job with SIGMA (Support for Improvement in Governance and Management) provided the right opportunity to get broader experience in public sector reform.

'SIGMA is a joint initiative of the OECD and the EU. We work with 18 non-EU member countries – from Albania to the Ukraine - to strengthen public governance systems and administration capacities in prospective EU member or neighbouring countries, which stretch as far as north Africa and the middle East.

'My work is focused on supporting countries to strengthen their public financial management and external audit systems, through the provision of advice on reforms and tools to support their implementation, providing recommendations for improving the legislative frameworks and administrative arrangements, and sharing good practice across the countries. We also develop policy papers and comparative studies across countries.

'The public sector environments and financial management of some of the countries are very challenging, and much that we take for granted in the UK is still at an early stage. There are lots of issues around concepts and principles, changing mind-sets and developing robust public financial management. There are also some significant political hurdles to be overcome in moving the public administration reform agenda forward. Cultural diversity also presents its own challenges, requiring careful consideration of how we approach issues in each country.

'The work is very different to my previous jobs, because I'm supporting institutions and sharing knowledge, rather than holding them to account.



Alastair Swarbrick

'Over the last six years my family have certainly had some interesting experiences moving from Edinburgh to a small Caribbean Island, and then five years later back to the bustling metropolis of Paris. It is great to be back in Europe, closer to family and friends than a 12-hour flight away. At times we miss the beaches and sunshine of Cayman but ultimately a small island can become quite claustrophobic, especially in a high profile and public role such as the Auditor General.

'The biggest challenge for us as a family is learning French. My office works in English and my seven years of school French lessons have not really prepared me to communicate effectively. Luckily I have very helpful colleagues who have led me through the bureaucracy of setting up home in Paris.

'The CIPFA network has long arms - another former Auditor General of the Cayman Islands and SIGMA employee, Nick Treen, is also a member. Noel Hepworth, former CEO of CIPFA, is working for me as a consultant on a project in Georgia and I'm in regular touch with Gordon Ferrier.'

Membership rewards

CIPFA Rewards gives you access to a range of benefits and discounts. This New Year's highlights include:

2016 Cricket Club membership - less than half price

Enjoy a summer of cricket at Lord's Cricket Ground! For just £100, reduced from £265, join as a full member of Middlesex County Cricket Club*.

[Find out more.](#)

Free Nights across hundreds of hotels in Europe with Superbreak

Plan a break to one of Europe's most exciting cities and take advantage of an extra night free plus enjoy an additional 10% discount *. [View more information](#)



Lifestyle Protection

PG Mutual can provide you with a tailored Income Protection plan ensuring you receive a monthly income if you find yourself on sick leave, plus

building up an investment element for your future*. [View more information.](#)

*Terms and conditions apply to all benefits. See website for details. Offers subject to change without notice.

Accountant volunteers for Botswana health charity



Alistair Ross

The start of a new year is often the time we renew our hopes and aspirations and think about how we can make a positive impact in the year ahead.

One CIPFA member who will be doing just that is Alistair Ross, as he departs for Botswana on a volunteer assignment arranged through Accounting for International Development (AfID).

Alistair will be working with Young 1ove, an organisation that gives young people the life-saving information they need to protect themselves from unwanted pregnancies and HIV/AIDS.

Good luck Alistair!

Alistair follows 32 other inspirational CIPFA members who have provided invaluable accounting support to charities and NGO's across the developing world since AfID's inception in 2009.

As a CIPFA qualified accountant you really can make an extraordinary difference to people's lives and be a force for good in 2016.

Visit www.afid.org.uk to start your own volunteer journey, or even a permanent move to the non-profit sector.

Regional news

Northern Ireland Team of the Year

The finance team at Antrim & Newtownabbey Borough Council has won the CIPFA Northern Ireland Team of the Year in 2015 and received their award at a special ceremony in the Council offices in December attended by Deputy Mayor Alderman John Blair.

Over the last two years, Councils in Northern Ireland have prepared for the most significant structural change and reform since 1972. A top priority for the Council was ensuring proper governance, bringing together a new team as well as ensuring a new robust finance and payroll system, processes, all which was achieved so there was a smooth transition and continuity of services for the public.

On presenting the award to Maureen Larmour, the longest serving member of staff, Steve Mungavin, Head of CIPFA in Northern Ireland said: 'CIPFA recognises the tremendous effort made



Antrim & Newtownabbey Borough Council celebrate winning their Team of the Year accolade from CIPFA

by the whole finance community in local government in Northern Ireland over the last two years in supporting change, especially here in Antrim and Newtownabbey. As a local resident of the Borough, I am very pleased and

assured to know that we have a top performing team managing our finances, and as a bonus it's great that the Council has maintained domestic rates at the same level and reduced business rates!

Volunteers needed for CIPFA Midlands sixth form games

Building on the success of previous years, CIPFA Midlands has scheduled their popular management games in 2016 on Wednesday 22 and 29 June, and 6 and 13 July.

The games aim to fill a gap in business studies courses, which concentrate on commercial activities and often do not cover the public sector. They are held in June and July across the Midlands. Since 2006, some 90 schools and colleges have provided over 200 teams at 40 games.

The day is an excellent introduction to the world of work and a way of developing and strengthening teamwork, leadership, management and organisational skills.

If you have links with a Midlands school or college with post-16 students which may be interested in taking part in future games, please encourage them to contact Chris Gill or Kelly Watson, E: 6thForms@cipfa.org.

We are looking for support from members – general, student and retired, all welcome – to help take forward these very successful games.

Please [download a briefing](#) for more information.

Yorkshire and Humber annual dinner rescheduled

The region's annual dinner originally due to take place on 15 January 2016 at the Crowne Plaza in Leeds has been rescheduled for 11 March. It had to be cancelled due to flooding at the venue.

The evening will commence with a drinks reception and will be followed by a three course meal, with wine.

After Dinner CIPFA Past President, Mike Owen will address the guests and then present the regional award winning students with receive their prizes.

The charge for the dinner is £25 (incl VAT). See the [Yorkshire and Humber website](#) for more details.

Treat your career as your business says NW Student Network

2015 was a very busy year for the North West CIPFA Student Network (NW CSN) and it ended in style with the North West Annual Conference in November. NW CSN organised a free student break-out session, which many regional students took advantage of to hear speakers present topics directly related to their interests.

Liga Berzina, NW CSN President (Wigan Council) and Past President Carol McDonnell (St Helen’s Council) started the session with a presentation of PEP. The interactive session brought together all available PEP resources on the CIPFA website and allowed students to discuss their progress on portfolios. If you are a North West Student and would like to receive support and guidance on PEP, get in touch with the NW CSN.

Aimee Bateman from Career Cake gave an excellent and engaging presentation with insights on how to use social media to approach potential future employers and business partners. She fascinated students with advice on how to become sophisticated in selling yourself, the



Aimee Bateman, from Career Cake, presenting at the North West annual conference

importance of communicating properly with the right people, how to be a rebel and succeed in the job market and the importance of building your own brand image. Her closing advice - treat your career like your business - could be the NW CSN motto for 2016.

Next up was David Fields, e-Assessment Project Manager at CIPFA who gave insight into the full roll-out of e-assessments in 2016. David did an excellent job answering student queries

and removing any doubts students had. However, it feels like it is ‘a job in progress’ to convince all students in the region that e-assessments will provide a more satisfactory exam experience. NW CSN hopes to see David again in the near future to show the process to many more local students.

Do put yourself forward to join the NW CSN Committee - our elections are set for early spring. Contact NW CSN on E: NorthWestStudent@cipfa.org.

CIPFA in the North East Annual Conference

CIPFA in the North East held their fifth annual regional conference at The Sage, Gateshead on Friday 20 November 2015.

Sir Tony Redmond, Past President of CIPFA, chaired the event, and introduced the various speakers:

- Professor Mark Tewdwr-Jones from Newcastle University, talking about Newcastle City Futures and scenarios for 2065.
- Henry Kippin of Collaborate, on how to manage rising demand for public services.
- Michael Brodie, Finance and Commercial Director, Public Health England, and Past President of CIPFA in the North East, on public health and public service reform.
- John Matheson, current CIPFA President and Director of Finance for the Scottish Government Health Directorates, on health and social care integration in Scotland.
- Tana Forrest from CIPFA on an update session for the student members present, including an introduction to CIPFA’s Professional Experience Portfolio (PEP) for students.
- Michael Johnson, from the Centre for Policy Studies, asked ‘Who will care for Generation Y?’
- Kevin Morris and Sara Pearson from Zurich Municipal on risk and uncertainty in a changing world.

More details of the event, and links to copies of the speakers’ presentations, are on our [web page](#).

Photos are available [here](#).

Improving performance in Wales – it’s not just about the numbers

The CIPFA Cymru-Wales annual conference and dinner was held in the prestigious surroundings of Cardiff City Hall on 26 November 2015, under the banner ‘Improving performance – it’s not just about the numbers’.

The conference was opened by Iolo Llewelyn, President of CIPFA Cymru-Wales and John Matheson President of CIPFA. Jane Hutt, the Welsh Government’s Minister for Finance, provided the conference’s keynote speech. She outlined the financial challenges faced by the Welsh Government, and how it is trying to protect funding for services in Wales.

Huw Vaughan Thomas, the Auditor General for Wales, talked about the importance of going beyond the numbers and moving away from simply trying to meet numeric targets. He emphasised the need for public

services to take the managed risks required to move the focus from treatment to prevention.

Gavin Chalmers from Zurich Municipal led a workshop session on outsourcing and supply chain management which considered the potential risks and benefits associated with outsourcing.

Charlotte Moar, Programme Director for NHS Finance Academy Wales, outlined the academy’s activities and NHS Wales’ decision to award CIPFA the contract to exclusively provide tuition to trainees on the NHS Wales Finance Management Training Scheme.

Lynn Pamment from PwC demonstrated both the ‘traditional’ benefits of digital systems (improved administration and management systems resulting in better delivery of services), but perhaps more importantly the ability of digital services to transform people’s lives.

Andy Burns, Director of Resources at Staffordshire County Council, described how the Council had successfully addressed cuts in funding which, although they had resulted in significant reductions in staff, had led to greater public satisfaction in the Council’s services, and its ambitious plans to further radically change how it will serve the needs of its residents in future.

Finally Rob Whiteman, CIPFA Chief Executive, delivered an overview of the long term financial and service delivery challenges facing the public sector and the need to address them.

The main lessons learned at the conference were that the public sector in Wales needs to plan for the longer term, change the way in which it delivers services, and move from treatment to prevention.



Jane Hutt, Minister for Finance, Keynote speaker at the CIPFA Cymru-Wales conference



CIPFA Chief Executive Rob Whiteman and two Presidents: Iolo Llewelyn and John Matheson

CIPFA Cymru-Wales annual awards dinner

The CIPFA Cymru-Wales annual dinner rounded off the day at the region’s annual conference on 26 November.

The evening started with the President’s drinks reception, which was followed by a fabulous dinner. The guest speaker was Richard Parks who provided a fascinating talk on

how he had overcome the injury that had led to the early demise of his rugby career to become an extreme environment athlete. During the dinner, CIPFA President John Matheson presented Sian Thomas and Selena Hardie with Volunteer of the Year awards in recognition of their support over the years to CIPFA in Wales.

Our nominated charity for the year was the World Medical Fund for Children and a raffle held at the dinner raised £540. This was more than doubled to £1,215 by Gift Aid and a matched donation via ‘The Big Give’.



CIPFA President John Matheson presents Tom Clarke with his Award. (Jim Mackey was unable to attend.)

EY/CIPFA in the North East Joint Award 2015

CIPFA and EY have launched an award for individuals who deliver an outstanding contribution to public services in the North East, and the winner was announced at the Annual CIPFA North East conference on Friday 20 November 2015.

Congratulations to Tom Clarke and Jim Mackey, joint winners of the inaugural Award for Public Sector Accountant of the Year in the North East of England.

Tom was recognised for his contribution to the Bus Strategy Delivery Project of NEXUS, acting on behalf of the North East Combined Authority. Jim was recognised for his appointment as Chief Executive of NHS Improvement, to oversee the amalgamation of Monitor and the Trust Development Agency.

Further details, and the full citations for each winner, are on our [web page](#).

Invitation to Midlands region AGM and CPD session in March

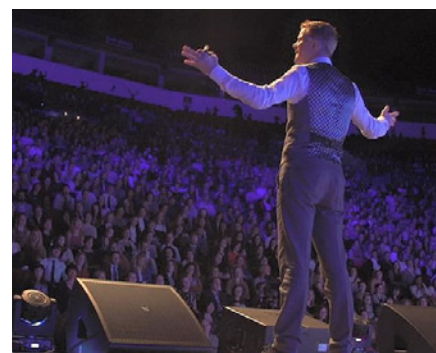
If you're a student or member of CIPFA based in the Midlands, do keep the afternoon of Thursday 3 March free to join the President and CIPFA in the Midlands at BDO's new offices in Birmingham for the 2016 AGM and professional development session.

John Matheson, the President of CIPFA, will make a speech and present certificates to the newly elected CIPFA members in the region. The acclaimed Richard McCann will be our motivational speaker.

As in previous years, this event is free to attend and on this occasion there IS such a thing as a free lunch - because we are providing one!

We look forward to seeing you there.

www.cipfa.org/training/c/cipfa-in-the-midlands-2016-agm-and-development-event-20160303-west-midlands



Richard McCann

Student news

Inspiring students to choose public finance career

In 2015 the CIPFA Student Recruitment team worked throughout the year to increase their student and university engagement. The team, along with numerous volunteers and members of staff, attended over 90 careers fairs and presentations across the United Kingdom.

The Student Recruitment team would like to thank all the CIPFA members, ambassadors and staff who gave up their time to raise awareness about CIPFA and inspire students to take up a career in public finance. Thanks to your help, we were able to reach more people than ever, with over 2,000 student requests for regular updates on graduate opportunities within the public finance sector.

We already have an ever-growing list of university events confirmed for this year and we are always in need of assistance from our members. If you would like to volunteer, please email Victoria Davitt (E: victoria.davitt@cipfa.org) for more information about how to get involved. Here's to another great year of university engagement!



Ben Harwood from our Telesales team at Essex University's careers fair



CIPFA's stand always attracts lots of student interest

Meet the tutor

Jayne Thompson, Tutor, CIPFA Edinburgh office

Chartered Accountant Jayne Thompson has worked for CIPFA in the Belfast office for over seven years, in the consultancy and finance sections and more recently with CIPFA Education and Training Centre.

Her career has taken her to KPMG in Australia and BBC Worldwide in London before settling in her native Northern Ireland working for Sport NI ahead of joining CIPFA.

She has tutored in-house and public training courses including payroll, introduction to accounting, finance for non-financial managers and budgeting skills.

This month, she starts commuting from Northern Ireland to tutor in the Edinburgh office.

'I have tutored AAT level 2 and 3 in Belfast for a number of years. Our pass rates have always been high but for the

first time last year we achieved 100% pass rate on all assessments for both levels.

'This year, we are rolling out AAT Level 2 in CIPFA Edinburgh from February. I was so excited to have the opportunity to tutor in Scotland. I can't wait to visit family and old university friends – I studied at Abertay University in Dundee - and enjoy a little haggis!'

CIPFA is aiming to roll out both AAT levels 2 and 3 throughout the rest of the UK in the next few years. CIPFA Northern Ireland will also be introducing the AAT apprentice scheme, which has been very successful in the other CIPFA offices across the UK, from September 2016.

'These are very exciting times for AAT training within CIPFA and I am looking forward to the challenge the next few years will bring,' said Jayne.



Jayne Thompson, Tutor, CIPFA Edinburgh office

Have your say on ethics for young accountants

The umbrella body for European accountancy bodies, FEE (Fédération des Experts-comptables Européens), is looking for input on its *Ethics for Young Accountancy Professionals Survey*.

Ethics is an essential component of being a professional accountant.

FEE is committed to continuously promoting ethical behaviour that helps contribute to an efficient, transparent, and sustainable economy.

If you are under 35, please take 15 minutes to share your views on ethical behaviour and your relevant competences by taking the [Ethics for Young Accountancy Professionals Survey](#).

For updates and the results, follow FEE on twitter [@FEE_Brussels](#) and www.fee.be



CIPFA Professional Qualification is changing

Following the launch of the Certificate stage in 2015, the CIPFA Professional Qualification become fully operational in 2016. The new PQ will increase the focus on the wide range of commercial skills needed by UK public finance practitioners and deliver greater portability between the public and private sectors.

There are a number of changes that took effect from January 2016:

- case study exam will be 3.5 hours in length from the June 2016
- all Certificate and Diploma exams will be delivered online; Strategic Case Study and Strategic Public Finance which will be delivered on paper in June 2016
- practice exams will be made available to all students to ensure they are prepared for the new assessment methods.

Exam formats will better test the breadth and depth of the new syllabuses and make the best use of online delivery.

The key changes include:

- no optional questions
- new pass marks for Financial Accounting, Management Accounting (60%) and Strategic Case Study (50%)
- shorter exam times (ranging from 2 hours to 3.5 hours for Strategic Case Study)

- fewer overall marks available in most exams
- past papers (exam guides) will no longer be published.

Certificate and Diploma level modules will be examined online. Students will have the following options:

- Online exam with remote invigilation at home * (recommended)
- Online exam with remote invigilation at work *
- Offline exam with a local invigilator at work (this option will require software download and a windows computer). Students will be required to arrange their own invigilator and a suitable place at work to take the exam.

*Stable internet connection is required. A wired connection is strongly recommended. Students will also be expected to arrange a suitable place to take the exam that is quiet and private.

Strategic Case Study and Strategic Public Finance will be examined on paper at Belfast, Birmingham, Edinburgh, Leeds and London examination centres.

Practice question banks will be available with a complete set of practice questions for each module for students to practice online. These will be included in course prices for students enrolled on CETC and Kaplan courses.

Progress tests and mock exam will also be taken online.

New learning materials (workbooks) have been written for all modules and will be published online from 1 February.

Specimen examinations (in PDF) will be published online from mid-February at: www.cipfa.org/students.

For any queries, please contact E: studentsupport@cipfa.org.

Students sit first exams for integrated audit qualification

The first cohort of students studying the CIPFA and ICAS (Institute of Chartered Accountants of Scotland) Integrated Qualification in Audit took their first set of exams recently.

The new qualification draws on the expertise of both institutes to ensure public sector auditors are fully prepared for a world in which public services are increasingly provided through private contracts.

These exams mark an important milestone in the partnership between CIPFA and ICAS and a step towards introducing an Integrated Accountancy Qualification later this year.

[See Rob Whiteman and Anton Colella discuss the benefits of an integrated approach to audit.](#)



Events

Conferences

CIPFA holds key conferences across a range of areas from technical guidance to debate and thought leadership provided by top speakers, experts and commentators. Search under 'conferences' at www.cipfa.org/events for our full listing.

EXCELLENT GOVERNANCE FOR WALES

23 February, Cardiff

This conference provides a good basis for governance support to public bodies in Wales. It will include a dedicated governance surgery which will provide delegates with the opportunity in an informal but confidential session to discuss governance issues.

www.cipfa.org/training/e/excellent-governance-for-wales-20160223

CIPFA TREASURY MANAGEMENT NETWORK CONFERENCE

3 March, Bloomberg, London

The Annual CIPFA Treasury Management Network Conference has become a milestone in the treasury officer's yearbook. The conference is a practitioner-led event focusing on the challenges ahead for treasury managers and provides independent opinion and exceptional networking opportunities. We will tackle real life scenarios, providing treasury and capital managers direct access to leading practitioners and economic experts.

Online shortly; please contact

E: rikki.ellsmore@cipfa.org.

CIPFA SCOTLAND PUBLIC FINANCE CONFERENCE 2016

17 & 18 March, Radisson Blu, Glasgow

Entrepreneurial leadership in a time of austerity: leading public services to success. The 2016 conference programme will unlock the entrepreneur in public servants by dropping the traditional barriers between the public and private sectors, ensuring that true collaboration, good practice and innovative thought are recognised.

www.cipfa.org/training/cipfa-scotland-public-finance-conference-2016

CIPFA INTERNAL AUDIT CONFERENCE

28 April, Nottingham

The leading internal audit event in the public sector calendar once again provides strategic insight and practical support for those working in public sector audit.

The conference will address a wide range of topics including updates on audit professional standards, key risk areas and improving the effectiveness of internal audit. The 2016 event will comprise a day of talks and debate, preceded the evening before by an optional pre-conference session and dinner. Further details, including prices, to be confirmed shortly – contact E: rikki.ellsmore@cipfa.org.

Save the date

Look out for more events at www.cipfa.org/events over the coming months:

CIPFA IT AUDIT SEMINAR

8 June, Birmingham

LOCAL GOVERNMENT ACCOUNTING CONFERENCES

July, London and the North

Please contact E: rikki.ellsmore@cipfa.org for more information.

Accredited Training Programmes

PROFESSIONAL DEVELOPMENT AWARD IN COMMISSIONING, PROCUREMENT AND CONTRACTING FOR CARE SERVICES

Starts 24 February, Edinburgh

www.cipfa.org/training

DIPLOMA IN CORPORATE GOVERNANCE

Starts 22 February, Cardiff

www.cipfa.org/training

Starts 23 February, Edinburgh

www.cipfa.org/training/d/diploma-in-corporate-governance-20150901-scotland

Starts 23 March, Belfast

www.cipfa.org/training/d/diploma-in-corporate-governance-20160323

CERTIFICATE IN CORPORATE GOVERNANCE

Starts 10 February, Cardiff

www.cipfa.org/training

Starts 19 February, Belfast

www.cipfa.org/training/c/certificate-in-corporate-governance-20160219-northern-ireland

Starts 24 February, Edinburgh

www.cipfa.org/training/c/certificate-in-corporate-governance-scotland-20160126-scotland

BETTER BUSINESS CASES

7 & 8 March, Belfast

www.cipfa.org/training/b/better-business-cases-20160307-northern-ireland

14 & 15 March, Edinburgh

www.cipfa.org/training

17 & 18 March, Cardiff

www.cipfa.org/training

PRINCE2®

Starts 16 May, Edinburgh

www.cipfa.org/training

AAT LEVEL 5 CERTIFICATE IN ACCOUNTING

Starts 18 February, Edinburgh

www.cipfa.org/training/a/aat-level-5-20150907

AAT LEVEL 4 - BUSINESS TAX

11 February, Belfast

www.cipfa.org/regions/northern-ireland/training/aat

AAT LEVEL 4 – FINANCIAL PERFORMANCE

14 April, Belfast

www.cipfa.org/regions/northern-ireland/training/aat

CERTIFICATE IN CONTRACT MANAGEMENT

Starts 1 March, Edinburgh

www.cipfa.org/training

Starts 8 March, Cardiff

www.cipfa.org/training

Starts 22 March, Belfast

www.cipfa.org/training/c/certificate-in-contract-management-20160322-northern-ireland

CERTIFICATE IN INVESTIGATIVE PRACTICE

Starts 14 March, Belfast

www.cipfa.org/training/c/cipfa-certificate-in-investigative-practice-20160126-northern-ireland

CERTIFICATE IN PUBLIC SECTOR PROCUREMENT

Starts 22 April, Belfast

www.cipfa.org/training/c/certificate-in-public-sector-procurement-20160422-northern-ireland

Regional Training

Midlands

REGIONAL AGM AND DEVELOPMENT DAY

3 March 2016

www.cipfa.org/training/c/cipfa-in-the-midlands-2016-agm-and-development-event-20160303-west-midlands

Wales

CIPFA WALES VOLUNTARY TREASURERS AND AUDITORS SEMINAR

18 February, Wales

Many CIPFA members give their time to charities or other voluntary organisations as treasurers or independent examiners. But what are the accounting requirements, external reporting, assurance, regulatory and professional issues?

Led by Rebecca Nelson, CIPFA Cymru-Wales Branch Treasurer and John Maddocks, CIPFA Technical Manager, these will be explored, together with details of the new Charities SORPs and the regulatory aspects of performing such roles.

www.cipfa.org/training/c/cipfa-in-the-midlands-2016-agm-and-development-event-20160303-west-midlands

CIPFA WALES ANNUAL GENERAL MEETING 2016

2 March, Colwyn Bay

Hear the latest take on economic forecasts and the Bank of England's assumptions and observations on them, presented by the Bank's Agent Steve Hicks. This event will give you a rounded view to aid your understanding of some of the forces impacting public sector finances.

www.cipfa.org/training/c/cipfa-in-wales-annual-general-meeting-20160302



Who's who at CIPFA

Use this mini-directory to find the right people to contact at CIPFA about a specific area of our work. Where no direct line is provided, call our contact centre on 020 7543 5600 and ask for the relevant person.

Academies

E: academies@cipfa.org

Advisory - UK

Neil Vincent
E: Neil.Vincent@cipfa.org

Apprenticeships

Amrit Singh
T: +44 (0)121 200 0990
E: apprenticeships@cipfa.org

Audit

Keeley Lund
E: Keeley.Lund@cipfa.org

Benchmarking

Jane Owen
E: benchmarking@cipfa.org

Central government

Gillian Fawcett
E: gillian.fawcett@cipfa.org

Corporate communications

Steve Coomber
E: corporate@cipfa.org

Counter Fraud

Rachael Tiffen
E: counterfraudcentre@cipfa.org

Disciplinary Scheme

Helen Kitchen
E: dsadmin@cipfa.org

Education and Training

Nicola Campbell
E: cetc@cipfa.org

Financial management

Don Peebles
T: +44 (0)131 221 8640
E: don.peebles@cipfa.org

Financial reporting

Alison Scott
T: +44 (0)1604 889451
E: alison.scott@cipfa.org

Governance

Kerry Ace
T: +44 (0)2890 266778
E: Kerry.Ace@cipfa.org

Health

Jane Payling
E: Jane.Payling@cipfa.org

HR

Sandy Kerr
E: hr@cipfa.org

Local government

Cliff Dalton
T: +44 (0)1262 851725
E: Cliff.Dalton@cipfa.org

Joanne Pitt
T: +44 (0)208 339 2607
E: Joanne.Pitt@cipfa.org

Benefits and revenues

Caroline Lee
T: +44 (0)1254 385938
E: Caroline.Lee@cipfa.org

Better Governance Forum

Diana Melville
T: +44 (0)1722 349398
E: diana.melville@cipfa.org

Children's services

Lisa Forster
T: +44 (0)1430 423663
E: lisa.forster@cipfa.org

Funding and finance

Neil Sellstrom
T: +44 (0)128 761 9679
E: neil.sellstrom@cipfa.org

Housing

Dr Louise Dunne
T: +44 (0)7767 865614
E: louise.dunne@cipfa.org

Insurance, procurement and commissioning

Mohamed Hans
T: +44 (0)1924 461825
E: mohamed.hans@cipfa.org

Pensions

Neil Sellstrom
T: +44 (0)128 761 9679
E: neil.sellstrom@cipfa.org

Police

Alison Dewhirst
T: +44 (0)1904 675587
E: alison.dewhirst@cipfa.org

Treasury management

Neil Sellstrom
T: +44 (0)128 761 9679
E: neil.sellstrom@cipfa.org

Membership

Duncan Judd
E: membership@cipfa.org

Publications

Rhiannon Price
E: Publications@cipfa.org

Property

David Brindley
T: +44 (0)1244 394614
E: david.brindley@cipfa.org

Recruitment (CIPFA-Penna)

Phillipa Watkins
T: + 44 (0)20 3829 9745
E: philippa.watkins@penna.com

Regional Branches:

CIPFA Scotland
Don Peebles
T: +44 (0)131 221 8640
E: don.peebles@cipfa.org

CIPFA Wales
Chris Tidswell
T: +44 (0)7825 190321
E: chris.tidswell@cipfa.org

CIPFA Northern and Republic of Ireland
Steve Mungavin
T: +44 (0)2890 266778
E: Steve.Mungavin@cipfa.org

Brian Donnellan
T: +353 (0)87 6620630
E: Brian.Donnellan@cipfa.org

Research

Jonathan Gordon
E: Jonathan.Gordon@cipfa.org

Statistics

Martin Hole
E: Martin.Hole@cipfa.org

Students and qualifications

E: studentsupport@cipfa.org

Student recruitment/ university engagement

Victoria Davitt
E: Victoria.Davitt@cipfa.org

TISONline

Alice Pearson
E: Alice.Pearson@cipfa.org

Training courses and events

Customer Liaison
E: customerliaison@cipfa.org

Websites

Anna Atkinson
E: anna.atkinson@cipfa.org