

# Spreadsheet

CIPFA.ORG | NEWS FOR MEMBERS AND STUDENTS

MARCH 2020



women leading  
the way

CIPFA North East regional event: Inspiring Women

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CIPFA

# Message from the President

Here we are. 2020. Not only a whole new year, but a whole new decade. Suffice to say, a lot has happened since you were last reading *Spreadsheet*. We have a new government, who came to victory in December with a remarkable majority from the country. We have officially left the European Union and entered the transition period – though time will tell whether this ends up being extended beyond the end of the year.

At time of writing, the Queen’s Speech has taken place and a budget has been announced, though we’re still waiting on details of a comprehensive spending review. Here’s hoping that as you’re reading this, more light has been shed on what the future looks like for public services.

If we look back on the previous decade, the picture can seem bleak. The 2019 Performance Tracker, which CIPFA produces in partnership with the Institute for Government, showed that overall performance has declined across all public services, and planned government spending will not be enough to maintain, let alone improve, standards in demand-led services like social care.

But as we enter a new decade, amid all of the challenges, I feel we also have a

lot to be optimistic about, both within CIPFA and as a sector. CIPFA’s recent Resilience Index showed that, despite a decade of austerity, the majority of councils are still maintaining strong financial positions. The Performance Tracker showed a consistent level of satisfaction from those who receive adult social care.

At CIPFA, we continue to make great strides in our efforts to bring world-class education and training to public sector professionals around the world at all stages of their careers. Our Level 7 apprenticeship provision is gathering pace, with nearly 500 students now enrolled.

CIPFA has also been selected to deliver training for the International Fund for Agricultural Development (IFAD). The three-year project will support improved financial management and governance within organisations that receive IFAD grants and loans to address hunger and poverty in rural areas of developing countries.

And of course, congratulations to our CEO Rob Whiteman, who was awarded a CBE for services to public sector financial management in the New Year Honours – a well-deserved accolade.

So, albeit a bit late, happy new year to all of you. Let’s enter the year with optimism – may the new decade mark a turning point for public finances.



**Carolyn Williamson,  
President**



**The spread of coronavirus (COVID-19) continues to be of major national and international concern.**

CIPFA takes the health and safety of our students and members extremely seriously and we are keeping a close watch on the situation. Our aim is to safeguard our stakeholders’ health while continuing to provide the high level of service and support you expect from us.

Due to the fast-moving nature of the situation, please check the [CIPFA website](#) for latest updates and further information.

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We welcome your feedback on *Spreadsheet*. Please send your comments and suggestions for future articles to the editor.

# Current issues

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## Opening the door to diversity

*By Rob Whiteman CBE, CIPFA CEO*

Diversity is a crucial concept in an age of political uncertainty and rapid technological change. To navigate this change successfully, we must recruit the best and brightest talent and ensure our profession reflects the populations we are making decisions for.

Diverse perspectives are crucial to understanding the world we live in and finding the best solutions to problems. It's essential that marginalised voices are incorporated into our decision making to make public finance even more innovative. Well-intentioned discussions take place frequently around diversity and inclusion, but how do we turn this into action?

There are immense complexities and uncertainties confronting the workforce as we look to the future. Public finance and accountancy professionals are ageing along with the general population in the UK, and the majority of people employed in these fields are 'pale and male'.

This topic was addressed at the CIPFA Central Government Summit in November 2019, by Rachel McLean from MHCLG and Dr Louise Ashley from Royal Holloway University of London. They highlighted how organisations should endeavour to recruit individuals of diverse backgrounds who may need different types of support and working arrangements as they progress in their careers.

At CIPFA we believe that the first step is to recognise the lack of diversity in our field, understand the causes and be transparent about what our organisations are doing to combat these issues.

The culture of the workplace must also change. We need to work harder to make employees feel like their aspirations and career development are supported, and that they are not outsiders.

Dr Ashley used the idea of Cinderella's glass slipper to illustrate how roles can favour people from particular backgrounds. Because the finance profession was made by and for white (often middle class) men, the role fits them perfectly. Over time, we begin to assume that the characteristics of this group are essential to perform finance jobs well – which is simply not the case.

A dedicated effort must be made to recruit those who would not normally consider jobs in public finance. This is crucial if we are to effectively provide services for those who are marginalised in our communities. The public finance field helps society, and so our workforce must reflect the populations we serve.

A highlight of the November summit was a panel discussion between four CPFAs in central government leadership positions. Diversity was an important aspect of their discussion, as they considered the best ways to encourage new talent to enter the profession. They stressed the importance of internships and outreach, attracting talent from the private sector, as well as focusing on creating well-rounded finance professionals that can gather expertise and move around the public sector.

In addition to attracting people from diverse backgrounds, at CIPFA we believe it is vital that an effort is made to recruit young people and motivate them to remain in the field for life.

Research tells us that today's young people want different things from their careers than previous generations. They want to feel like they are making an impact on the world by dedicating themselves to a profession that displays environmental consciousness and offers flexibility for its workers.

Therefore we must be open to changing our mindset and investing in our existing and future workforce. We have to demonstrate a willingness to rethink our talent management strategies and train our workers in the working practices of the modern age.

At CIPFA, we're dedicated to bolstering diversity within our own organisation. In an effort to support the talent pipeline, CIPFA offers training and lifelong learning to those who wish to continue gaining skills that are essential for the profession moving forward. As we prioritise attracting new and diverse talent, we must take every step possible to ensure that we are opening doors.

## The Redmond Review: In context

*By Joanne Pitt, Local Government Policy Manager, CIPFA*

Audit in the UK has a long and complex history. While the origins of local audit go back to 1314, some of the biggest developments in local audit have only occurred in the last four decades.

Last summer, former CIPFA President Sir Tony Redmond was asked to lead a review into local authority external audit and financial reporting. The review, which will report back later this year, will determine whether the reforms introduced by the Local Audit and Accountability Act 2014 have been effective.

### A history of local audit

While modern-day audit has taken more than a century to form, possibly the most significant development for the public sector was the formation and then abolition of the Audit Commission in 1982 and 2014 respectively.

The Commission appointed auditors to local bodies and oversaw their finances at the national level. Even those not fond of the institution could see that a major benefit of the Audit Commission was that the auditors were independent. Public bodies were not involved in the audit process, and the Commission answered only to the public and the courts. While not perfect, the structure was designed to eliminate bias.

Over the years the Commission grew and some within the sector voiced their dissatisfaction with the organisation. The pressure for change continued, but rather than a restructure, a

new solution to public audit was presented through the Local Audit and Accountability Act 2014, which permitted local bodies to choose how they were audited and by whom. This new framework has now been tested and found to be wanting in certain areas.

The Redmond Review places a spotlight on local auditing practices in England. In addition to examining the effectiveness of local audit, the review also seeks to determine whether an 'expectation gap' exists between what the general public believe an audit will deliver, and what it can deliver in reality.

### A new audit body?

CIPFA has been vocal about its concerns for some time. Substantial changes are needed to the current audit framework. In our response to the Redmond Review, we call for the formation of a new independent regulating body to oversee local audit. The exact nature of this body should be openly debated but we think it should report on the overall local authority position, bringing together matters publicly reported in individual audits.

This new body will eliminate the fragmented structure of local audit in England. It could also go some way to restoring trust in local institutions by bringing together the appointments of auditors, standards and guidance for auditors, and those who hold them accountable into one independent organisation.

Governance arrangements for financial reporting and audit must improve to ensure that auditor recommendations are acted upon. The current framework for audit committees in local government should be reimaged to provide necessary support and reflect consistent best practice from across the public sector.

There is also scope to make improvements within the current framework, particularly as much of the audit work is driven by the Code of Practice for local public audit produced by the National Audit Office. Elements of the Redmond Review link with the recent NAO consultation on the Code of Practice and our response includes comments across both these pieces of work, ensuring we build on good practice.

Finally, we recognise that transparent financial reporting lies at the centre of public assurance. Clearly communicating key messages about financial performance is essential for trust and accountability.

At a moment when political rhetoric allows for new opportunities and great change, sound financial management, strong governance and effective audit must remain key pillars within public sector finance.

**So you've declared a climate emergency – now what?**

*By Rob Whiteman CBE, CIPFA CEO*

2019 saw the crisis facing our planet jump to the forefront of public consciousness. A combination of extreme weather events and vocal global activism made both the public and politicians stop and pay attention. By the end of the year, over half of UK councils had declared climate emergencies, making some ambitious commitments. Nottingham City Council set a target for the whole city to be carbon neutral by 2028, and Bristol City Council committed to the same goal by 2030.

Many of the pledges are in excess of the national target to be carbon neutral by 2050. These are noble and necessary ambitions and there is reputational capital to be gained from such declarations. However to date, there is limited evidence of concrete action to tackle these emergencies.

One of the biggest challenges is that climate change is not restricted to geography or sector. The public sector will need to work with the private sector, the public at large, and other geographies to make substantial strides.

There are opportunities for local government to take a greener approach to financial decision making, even if it is costly. At present, the focus of local authorities remains on economic growth and financial sustainability, which can complement a desire to pursue environmental goals.

There are going to be instances where trade-offs have to be made. Manchester City Council's plans, for example, to become carbon neutral by 2038 specifically exclude airport emissions. This is unsurprising given the authority's majority stake in

Manchester Airport and strong growth of the regional economy.

Public sector pension funds have been exploring how to make more sustainable investments while delivering the best outcomes for their members. This balancing act between environmental ambitions and financial outcomes will need to shift as the green agenda gathers pace. As incentives and regulation take hold, being green will become good business.

What could green finance look like in practice? For a start, councils have powers they can leverage to help reduce their carbon footprint – raising fees and charges to fund sustainability projects. Nottingham City Council's workplace parking levy has generated over £44m of revenue since 2012, enabling the city to double the size of its tram network and redevelop the railway station. Nottingham now has the highest level of bus/tram usage per head outside of London.

Social housing also presents opportunities for councils to make a difference and deliver on social value. Norwich City Council's Goldsmith Street won the 2019 Stirling Prize for its innovative eco-friendly design. The airtight design should reduce energy bills for tenants to around £150 a year, addressing local fuel poverty as well as climate change.

Government support for local authorities looking to become carbon neutral could be more sensibly structured. Financial support towards sustainability goals is a minefield, with different grants and pots of money scattered across multiple departments. Consolidating this would streamline support, make it easier to access, and likely increase take-up.



Rob Whiteman, CIPFA CEO

Accountability is key to success. Responsibility will have to be clearly assigned, and robust reporting arrangements put in place to track progress and demonstrate results to the community.

Ultimately, the move towards a more sustainable public sector is going to require a fundamental shift in priorities. As long as one-dimensional return on investment is the paramount concern, other goals, including sustainability, will have to fit in around it. Officers, councillors and local communities will need to view all activity in their area through the primary lens of the climate crisis to make a meaningful difference.

## Examining public financial management in fragile states

*By Salema Hafiz, Head of International Relations, CIPFA*

What do we mean when we talk about fragile states? Weak governance frameworks, ineffective parliamentary systems and the absence of political accountability are all factors that contribute to fragility. Unlike stable nations, which are less vulnerable to collapse or conflict resulting from social or economic shocks, fragile states may experience sudden social upheaval and violence as a reaction to change. Without consistent government, the management of public funds is often dogged by inefficiencies, inaccuracies and economic crime. Citizens can be left vulnerable to extreme hardship if issues surrounding public sector finance are not addressed.

The [Fragile States Index](#) (FSI), published annually by the Fund for Peace, classifies nations according to their level of stability. The FSI named Yemen the most fragile state in 2019, followed by Somalia and South Sudan. Each has suffered from violent conflict, leaving citizens in poverty and insecurity. Broadly, these fragile states have poor infrastructure and weak public financial management bodies, among other issues that are both causes and effects of political instability.

Financial management issues characteristic of fragile states include widespread corruption, fraud, low tax collection and highly bureaucratic environments that slow down decision making. At CIPFA, we're helping to address fragility in several countries around the world. By reducing the fragility of governments through better financial management, we can improve citizens' access to vital public services.

There has been some success in bolstering the ability of fragile states to effectively manage their finances.

To combat issues related to fragility, we've focused on developing leadership, professional accounting training, improving institutional and governance structures and strengthening legislation on financial oversight. In addition to improving the state of public financial management, our efforts aim to build up citizens' confidence in the responsiveness of the state.

One such example is our recent work in Somaliland, a self-declared state in east Africa that is internationally recognised as an autonomous region of Somalia. The state has historically been plagued by terrorism from militant groups in opposition to the federal government, resulting in a badly damaged economy and heightened security risks. These intermittent periods of volatility severely strain public budgets and limit the effectiveness of government services. Fortunately, some progress has been made recently.

CIPFA's International Public Financial Management (IPFM) Certificate provided students with the knowledge, skills and abilities for robust public financial management. More specifically, CIPFA training was provided to budget preparation officials, procurement officers, accountants and auditors from Somaliland's Ministry of Finance, as well as other ministries.

Tajikistan is a fragile state where CIPFA is currently providing financial management training. Historically, Tajikistan has faced widespread corruption due to the weak rule of law and lack of institutional transparency. Though improved from previous years, the post-Soviet nation is currently categorised with an 'elevated warning' on the FSI, ranked as the 65th most fragile state. Our work in Tajikistan is designed to increase political stability and organisational integrity



Salema Hafiz, Head of International Relations, CIPFA

by supporting the development of the country's Supreme Audit Institution, the Chamber of Accounts.

By January 2021, the project will introduce international audit standards built around five principles: modernising public financial management processes; strengthening the public procurement system; establishing an external audit entity; public administrative reforms; and a component for project management.

Together, these projects highlight the first steps to improve the public sector in fragile states. Although each country and government is unique, shared traits and challenges are clear – one of which is the inability to adequately manage public finances. It might be impossible to eradicate the causes of fragility throughout the developing world, but we can provide education and training to empower financial institutions in these nations to make informed decisions – ultimately leading to greater social cohesion, enhanced security and better public services for the most vulnerable.

## The risk and vulnerabilities of the business rates system

*By Joanne Pitt, Local Government Policy Manager, CIPFA*

It's a busy time of year for financial planning. Local authorities are finishing up their budget setting, and following central government's national Budget on 11 March, we anticipate a comprehensive spending review in due course. It's therefore unsurprising that the conversation around business rates is again raising its head. Business rates are an increasingly important source of income for councils, but we're continuing to see the vulnerabilities of the system present risk and uncertainty.

Business rates are a property tax on commercial premises, providing a stream of funding for the public sector to the tune of £22bn a year. However, the business rates system may no longer be viable or fit for purpose in a world where economic value is shifting into the digital space. In the Queen's Speech we were promised a fundamental business rates review. The government also committed to increasing the retail discount for retailers from one third to 50% and extending reliefs, to help struggling high streets. More frequent revaluations make the system more responsive to changing economic conditions.

For those relying on business rates as an income stream, a seismic shift in consumer behaviour has caused problems. Online shopping is increasingly regarded as cheaper and more convenient, and shoppers choose wherever they can get the best deal – often not on the local high street, which is a cause for concern for both businesses and councils.

The business rates system is complex. Discussions about payment, purpose and distribution are often opaque. Over the last seven years, complications have grown faster than ever as authorities and businesses attempt to balance fairness with local need and the requirement for transparency.

The appeals process has also changed in recent years. The 'check challenge' appeal process allows business owners (rate-payers) to dispute the valuation of their commercial property. A successful appeal will then reduce their business rates bill – good news for rate-payers, but less good for councils. For local authorities that are balancing their budgets to fund local services, such appeals can prove challenging. Cannock Chase District Council in Staffordshire recently lost over £1m through this system.

With less income, there are implications for service delivery. Good financial management becomes essential to manage the increased risk. Local authorities must ensure they have the funds to respond to the financial uncertainty that comes with increasing reliance on business rates. Robust data and timely information around appeals is vital for good risk management.

Unfortunately, risk is not spread evenly across the country. You only have to compare your own high street to that of the next town over, and the town after that, to see the difference in vitality of an area's 'bricks and mortar' retail market. Where there are fewer high business rate payers, there is a disproportionate amount of risk due to the lack of diversity in the local income stream. It only takes one high business

rate payer to go under for it to cause issues for council finances.

The problems are rarely of the individual local authority's own making; this means that finding a local solution within their gift can be difficult. The challenges arising are a result of the broader changing landscape for the retail industry. As long as local authorities are dependent on drawing income from bricks and mortar businesses, they are at the mercy of consumer habits.

Reform is needed to the business rate appeal system and CIPFA has already expressed our support for the alternative model, put out to consultation by the government last year. We look forward to engaging further in the debate, aiming to make the new system less volatile and more transparent.

## Institute matters

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### Khalid Hamid appointed as CIPFA Director of International

Khalid Hamid has joined CIPFA in the full-time role of Director of International.

Having started his career as an assistant auditor with the UK National Audit Office, Khalid qualified as a CIPFA accountant in 1990 and was promoted several times to the position of principal auditor. In his 30 years of public audit experience, he has held senior posts in South Africa and the UAE.

Most recently, Khalid was the executive director of the UAE State Audit Institution, serving more than 11 years at the audit body. He is currently the chair of the financial audit and accounting subcommittee of the International Organization of Supreme Audit Institutions (INTOSAI), which provides support to national supreme audit institutions, sets standards for public sector auditing and promotes good governance.

Speaking on the appointment, Rob Whiteman, CIPFA CEO, said “Khalid’s experience across the global public sector will be a huge asset to CIPFA’s work in the UK and abroad. Demand for CIPFA’s training, qualifications and public sector knowledge is increasing globally, and Khalid will play a critical role in CIPFA’s increasing support to organisations and students.”

Commenting on his appointment, Khalid said “I’m delighted to be joining CIPFA to help expand and develop the organisation’s international division. Promoting the principles of good governance, accountability and strong public financial management has been at the core of my work in the public sector over the past three decades.

“I look forward to beginning a new chapter of my career with CIPFA, working to strengthen the relationship between the Institute and key public sector bodies around the world.”



Khalid Hamid

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### Coming soon – Public Finance Live!

The biggest event in the public finance calendar is back – CIPFA’s annual conference is coming to London this July.

Featuring dedicated streams on counter-fraud and health and social care, Public Finance Live is set to be bigger and better than ever. Speakers confirmed so far include former Labour Special Adviser Ayesha Hazarika, LBC presenter Iain Dale and Professor Paula Surridge from the University of Bristol.

When: 8–9 July 2020

Where: QEII Centre, Broad Sanctuary, Westminster, London SW1P 3EE

More information:

[www.cipfaannualconference.org.uk](http://www.cipfaannualconference.org.uk)

### PQ Awards

CIPFA attended the 2020 PQ Awards on Wednesday 26 February. A great night was had by all, and congratulations to all of our shortlisted nominees.

Special congratulations to CIPFA alumni Ross Fraser for winning NQ of the Year, and to the North Staffordshire Combined Healthcare NHS Trust for winning Accountancy Finance Team of the Year.



## CIPFA is looking for new members to join its TISonline editorial boards

If your organisation doesn't get subscribe to CIPFA's [TISonline](#) service, you're missing out on access to the one place you can find technical information about the whole public sector.

The content is regularly updated by our specialist editorial boards. Have you ever thought about joining one?

TISonline is our Technical Information Service for public sector finance, a repository of essential information [across 36 topics](#).

As a member of a board you would receive the following benefits:

- Join a dedicated support network, benefiting both you and your organisation.
- Increase your specialist knowledge.
- Have your work published in a respected resource used by the majority of UK local authorities.
- Help guide other professionals to provide a better service and improve standards.
- Participation contributes to continuing professional development (CPD).
- Board members receive one free place per year on a CIPFA Network event.

- Board meetings are two or three times a year, with travel expenses paid.
- Free lunch provided at meetings.

Here is what some of our board members have said about their experience:

*"TISonline is one of the main ways in which CIPFA members still get the opportunity to support other members and provide a service that is genuinely for the greater good."* (Internal Audit)

*"Board membership is an interesting and valuable career development opportunity."* (Financial Management & Corporate Governance)

*"I have enjoyed my time contributing to TISonline over the past few years and find it gives me a sense of satisfaction contributing my technical and operational knowledge."* (Environmental Services)

*"It's enjoyable and rewarding."* (Budgeting)

Below is the list of boards with vacancies. Please contact [TISonline@cipfa.org](mailto:TISonline@cipfa.org) if you are interested in joining any boards.

To chat about subscription options, please contact [customerservices@cipfa.org](mailto:customerservices@cipfa.org) or call 020 7543 5600.

### TISonline ICT and Business Transformation Stream

Do you have a view on what you would most like to see covered on the [ICT and Business Transformation](#) stream? For example: emerging technology, customer experience, security, digital leadership and skills development, finance processes, standards, the organisation of the future, special interests (eg Brexit, impact of ICT on the environment). Please send your feedback to [Eleanor.Blake@cipfa.org](mailto:Eleanor.Blake@cipfa.org)

TISonline also has seven discussion forums where you can discuss the issues that matter to you with your peers. They are Audit, Capital and Treasury, Finance, Fraud, Housing, VAT and Section 33 VAT, and are [accessible online here](#).

- [Adult Social Care and Health](#)
- [Budgeting \(preferably from the NHS\)](#)
- [Capital](#)
- [Children's Services](#)
- [Financial Management and](#)

- [Corporate Governance \(preferably from the NHS\)](#)
- [Housing Association Finance](#)
- [Human Resources](#)
- [Leisure and Cultural Services](#)
- [Local Authority Housing](#)

- [Local Taxation](#)
- [Planning](#)
- [Transport](#)
- [Treasury Management](#)

## CBE for Rob Whiteman

CIPFA is proud to congratulate CEO Rob Whiteman who was awarded a CBE for services to public sector financial management in the Queen's New Year Honours.

Rob was appointed as CIPFA CEO in 2013 following a public sector career spanning both local and central government.

Rob began his career in local government in 1986 with the London Borough of Newham. By 2011, he had held roles including director of resources at the London Borough of Lewisham, and chief executive of the London Borough of Barking and Dagenham. In 2011, Rob joined the civil service as chief executive of the UK Border Agency.

Rob Whiteman, CIPFA CEO, said: "I am delighted and humbled to have been awarded this honour. However, I am even more proud to represent professionals working in public finance around the country.

"Our members are working every day across the entire gamut of the public



Rob Whiteman receiving his CBE from the Prince of Wales

sector to deliver vital services to every resident of the United Kingdom. Our society would not work without them, and I remain in awe of their passion and dedication to serving their communities."

Commenting on the awards, Sir Tony Redmond, CIPFA Past President, said: "I wish to offer my most sincere congratulations to Rob Whiteman for his well-deserved CBE.

"Rob, like many CIPFA members, has dedicated his life to public service. It is the tireless advocacy of public servants like Rob that drives ambitious aspirations for the sector as a whole."

Former CIPFA President Caroline Mawhood was also recognised, receiving an MBE for services to the economy.

If you have something that you'd like to share with your fellow *Spreadsheet* readers, drop an email to the editor, [kathryn.hunter@cipfa.org](mailto:kathryn.hunter@cipfa.org). Please keep your comments under 1,000 words.



## CIPFA to launch new Social Care Advisory Network (SCAN) in April

Social care continues to be a key challenge for councils. It accounts for up to 70% of spend in many authorities and is greatly influenced by demographic pressures, volatility of demand and the statutory nature of the services.

Evidence shows that those organisations that perform most effectively in providing social care, do so when their focus is on client need at all ages, which includes a seamless transition between children's and adult support.

It is for this reason that from 2020/21 CIPFA will be bringing together our adult and children's social care networks under one consolidated advisory offer, the focus of which is more on the needs of the stakeholder.

This new network will provide a comprehensive offer of support and advice including:

- technical accounting support and guidance from expert advisors
- attendance at a wide selection of regional open training courses for this network and topical conferences

- a series of action learning workshops enabling you to share knowledge and best practice with peers in an environment where the key financial and policy issues of the day can be debated
- timely updates and briefings on relevant political, financial and legislative issues, and information on how these will affect your job role and your wider authority
- exclusive website access to a wealth of published information including regular briefings and updates, current and past event presentation materials, briefings, newsletters and topical articles
- regular newsletters and horizon scans to keep you updated on the latest issues affecting your work
- Access to a CIPFA LinkedIn group as well as a dedicated Twitter hashtag (#cipfanetworks) for additional advisor updates and networking
- opportunities for networking, career development and CPD
- discounts off any CIPFA Essentials or other open training events run by other CIPFA Networks
- preferential rates for any on-site SCAN network workshops and free attendance at the action learning workshops
- access to other network events when bought under a corporate membership arrangement
- a regional and national practitioner network for you to share your views and concerns.

SCAN will be run by CIPFA Network Advisor Sandra Beard and CIPFA Associate Phil Harding who together are able to provide a wealth of experience in both finance and operational social care. Through CIPFA's links to relevant working groups and other advisory and technical networks, SCAN will be able to provide a comprehensive, one-stop shop for all those involved in social care.

If your organisation would be interested in subscribing to SCAN or if you have any questions, then please email us at [cipfanetworks@cipfa.org](mailto:cipfanetworks@cipfa.org) or call us on 020 7543 5600.

# CIPFA-Penna Talent Spot

## Finance Professionals of the Future – how should you be upskilling for 2020 and beyond?

What weight do you place on upskilling yourself for the future? Is it an optional extra, or a permanent priority?

If it's the former, we've got bad news for you. Any serious finance leader should be setting aside time to future-proof their skillset.

Why? Well, if you keep yourself up-to-date, you're more likely to progress your career. Awareness of innovation and trends allows you to implement change and improvement at your organisation too.

But who cares? Most likely your CEO. A 2019 KPMG study found that "CEOs are looking to the finance function to take on a considerably broader and deeper set of strategic responsibilities".

To ensure you meet these expectations, here's CIPFA-Penna's take on how to ensure a future-fit finance function.

### Digitise to thrive:

The KPMG survey of CEOs found that "emerging technologies will change the nature of shared services". Automation and advanced analytics have extreme implications for the future of our function. It's the role of a strong CFO to ensure innovations are learnt about and intelligently applied for efficiency in the finance function.

Look at thought leadership from the big consultancies, and connect through the CIPFA-Penna network to hear best practice from your peers.

### Step-up to strategy:

Organisational leaders are increasingly seeing the modern finance professional as a strategist. This trend means finance leads must assert themselves as a rightful member of the organisational top table.

Begin by taking steps to understand the strategic priorities and direction

in your organisation. Armed with this knowledge, a strong finance lead should involve themselves in top-level strategy. Finance should be a key contributor to scoping out commercial ventures or exploring the resurgence in devolution discussions.

Speak to your CEO to ensure your voice is included in decision-making.

### Connect internally:

Linked to this is the need to foster strong links across your organisation. A back-office mentality will no longer cut it. It's important to maintain dialogue with other departments so that in challenging times, you can call on these relationships. For instance, strong links with your environment director will help you to respond in an agile, connected and proactive way to weather and flood damage caused by winter storms.

Ensure you're in consultation with stakeholders so that finance is a part of call in times of need.

### And remember, there's no 'I' in team:

You are important, as is your development. But finance leaders need to sow seeds of proactive learning in their team.

This will increase the capacity and agility of your team, and ensure a talented future for our sector. Our market experience shows that the further up the finance hierarchy you move, the more constricted the talent pool becomes. In local government, the pool of candidates at deputy S151 and S151 level is particularly limited.

Your finance talent pipeline is critical in these uncertain times. It's simply not possible to step up to a statutory role without gaining experience of the political element, for instance. So, take time to upskill your team to create a line of succession.



Philippa Watkins, Associate Director at CIPFA-Penna

CIPFA-Penna recognises the importance of a strong future talent pool. It's why we're sponsoring the 'Public Finance Future Leader of the Year' award at the Public Finance Awards 2020.

### Want to talk more?

CIPFA-Penna are leaders in public sector finance recruitment. We find, excite and secure executive and senior management interim and permanent professionals for our clients. We've got an excellent record for placing the right people in the right roles. In fact, we're leaders in the industry. And even if we're just placing someone for the short term, we get to know our clients inside out. Because we're affiliated with CIPFA our knowledge and networks are second to none. Get in touch to get your finance talent ready for now, and the future.

For more information talk to our Associate Director, Philippa Watkins

[Philippa.watkins@penna.com](mailto:Philippa.watkins@penna.com)

# 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**.

Members are listed by city or town.

**Feyisayo Adekugbe**  
Erith

**Naveed Agahi**  
Templepatrick

**Jameela Akhtar**  
Southall

**Thomas Alder**  
Dumfries and Galloway

**Richard Appiah-Ampofo**  
Epsom

**Eve Bain**  
Aberdeen

**Louise Ballinger**  
Merthyr Tydfil

**Rebecca Bartram**  
Cambridge

**Manjora Singh Bisla**  
Leicester

**Richard Blewitt Jenkins**  
Cheltenham

**Glenda Carrick**  
Swansea

**Sean Charlton**  
Gateshead

**Adam Copley**  
Grantham

**Aaron Dhesi**  
Coventry

**Francis James Fallon**  
Altrincham

**Rhianne Farrell**  
Widnes

**Yasangee Fernando**  
London

**Sarah Fisher**  
Chesterfield

**Sarah Rhian Forrest**  
Cardiff

**Ross Andrew Fraser**  
Dumfries and Galloway

**Ffion Sian Geary**  
Ebbw Vale

**Neil Richard Goryn**  
Newmarket

**Laura Griffin**  
Cheltenham

**Ben Hanger**  
Chertsey

**Melanie Suzette Hanson**  
Twickenham

**Lucy Ann Hayes**  
Rugby

**Gavin Edmund Hawkins**  
New Milton

**Alexander Howarth**  
Chester

**Robert Hurren**  
Knaresborough

**Lee Hurst**  
Preston

**Shona Helen Ingram**  
Chorley

**Lydia Johal**  
Croydon

**Stephanie Jones**  
Southam

**Andrew Frederick James Kipling**  
Morecambe

**Michael Laycock**  
Wokingham

**Tiffany Leefe**  
Norwich

**William Lockwood**  
Leeds

**Hannah Martin**  
Hereford

**Ben Matthews**  
Leicester

**Timothy Mpofo**  
London

**Obiageli Ginikanwa Oweka**  
Croydon

**Damien Pantling**  
London

**Chloe Parker**  
Sheffield

**Melanie Poulton**  
Manchester

**Osmond Pratt**  
London

**Liam James Preston**  
London

**Adam Price**  
Merthyr Tydfil

**David Alistair Ray**  
Blackburn

**Laura Carmel Rix**  
Preston

**Elgan Roberts**  
Conwy

**Luke Jonathan Robinson**  
Newcastle upon Tyne

**Benjamin Sanders**  
Leeds

**Faria Shaheen**  
Manchester

**Jennifer Nesta Simmons**  
Cambridge

**Frances Slack**  
London

**Claire Spencer**  
Shrewsbury

**Claire Stanbury**  
Canterbury

**Emily Kate Stonehouse**  
Stockport

**Stephen Thynne**  
Sale

**Christopher Michael Whiteley**  
Bubbenhall

**Alexandra Wicks**  
Cardiff

**James Worthington**  
Wigan

**Daniel Wragg**  
London

**Joshua Yelen**  
Rutgers Business School, USA

**Collins Nabil Yinbil**  
Accra

**CIPFA Rewards for members**

Looking for ideas for the Easter weekend? CIPFA Rewards has offers on family days out, spa retreats and weekend breaks in the sun. To take advantage of these and other fantastic deals visit the [CIPFA Rewards special offers page](#) today!



**Savings on ferry crossings to France and Holland through CIPFA Rewards**

Start your adventure with DFDS and CIPFA Rewards with up to 25% off on all economy crossings from Dover to France. What’s more, you can also add priority boarding, ensuring you will be among the first on and off the ship\*. Alternatively, you can save up to 23% off on minicruises, plus a hearty breakfast, from Newcastle to Amsterdam. Treat yourself to a glass of prosecco and lots of other delectable snacks and treats in the premium lounge, available in Dover only. [Find out more.](#)



**17% off Worldwide Attraction Tickets**

This Easter, book attractions, excursions, theatre tickets and experiences all over the world with Onlineticketstore.co.uk. Whether it’s a week at DisneyWorld, a dinner cruise in Dubai or a day trip in Rome, you can look forward to hassle-free booking 24/7, instant e-tickets and unbeatable customer service.

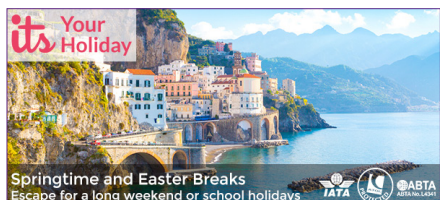
CIPFA members receive a 17% discount\*. [View more information.](#)



**£50 to spend at Virgin Wines with FREE prosecco and delivery\*!**

Virgin Wines are offering a fantastic £50 wine voucher to spend on your favourite wines this Easter, plus you’ll also receive a FREE bottle of Senti prosecco (normally £10.99) and FREE next-day delivery! Choose from exciting 12-bottle mixed cases starting at just £4.17 a bottle or browse over 550 top-quality, handcrafted bottles to pick and mix your own selection for the perfect Easter. This fantastic freebie-loaded £50 voucher acts as the perfect introduction to the cracking savings and exclusive VIP benefits you’ll receive as part of the Virgin Wines’ WineBank.

[Claim your £50 + free fizz and delivery today!](#)



**5% discount on your tailor-made Easter holiday**

It’s Your Holiday is ABTA and ATOL bonded with access to the best travel rates in the industry. We can help you book the perfect Easter break. We work in partnership with over 300 travel partners including; Expedia, TUI, Jet2Holidays, Haven, Hoseasons and many more. Let us help you make memories that last forever\*. [Find out more.](#)

\*Terms and conditions apply to all benefits. See website for details. Offers subject to change without notice. DFDS - 23% off valid only if traveling on foot. You must remember to bring your booking confirmation with you when checking in. Failure to do so could mean you may be unable to board the ship. Book online or by telephone. Travel by Inspire – 5% discount on cruises does not apply to all cruise companies/cruise offers. If you telephone Inspire to book or enquire about a cruise, you will be advised whether the discount can be applied. CIPFA Rewards is managed and run on behalf of CIPFA by Parliament Hill Ltd.

## Recent CIPFA publications



### Financial Management Code and Guidance Notes

Strong financial management is an essential part of ensuring public sector finances are sustainable. CIPFA's [Financial Management Code](#) (FM Code) provides guidance for good and sustainable financial management in local authorities and will provide assurance that authorities are managing resources effectively.

The FM Code identifies risks to financial sustainability and introduces a framework of assurance. This framework is built on existing successful practices and sets explicit standards of financial management. Complying with the standards set out in the FM Code is the collective responsibility of elected

members, the chief finance officer and their professional colleagues in the leadership team. Complying with the FM Code with help strengthen the framework that surrounds financial decision making.

The [FM Code Guidance Notes](#) work alongside the FM Code and draw out further details and clarification of the principles and statements to assist local authorities with demonstrating their financial sustainability.

Both titles are available as part of a [series of packages](#) that support local authorities in building a financially sustainable future. Our support includes the FM Code, the FM Code Guidance Notes, a conference, webinars and a bespoke workshop.



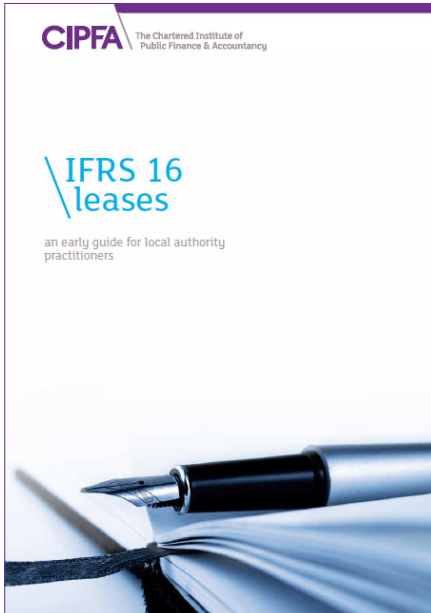
### Leadership Matters

All organisations need good leadership. But what does this look like for a local authority operating in a complex regulatory environment and for which leadership is shared between members and officers? [Leadership Matters](#) provides practical guidance to help local authorities assess and develop their leadership teams.

The success of the leadership team depends critically on the relationship between members and officers. Members will have a political mandate but may have limited understanding of the inner workings of the local authority and its legal and financial framework. Officers will be well versed in the duties and responsibilities of their

local authority but must look to elected members to determine the authority's direction, set priorities and take key decisions. This guide explores these dynamics and considers best practice leadership for local authorities across six areas.

The resource, including challenge questions, will help to support all members of the leadership team or those aspiring to be leaders. It also provides a resource to support a self-assessment as part of a wider governance review, audit or improvement plan.



### **IFRS 16 Leases: An Early Guide**

[IFRS 16 Leases: An Early Guide](#) provides comprehensive coverage of the proposed requirements for lessees, including the accounting definition of a lease, recognition of assets and liabilities, measurement, derecognition and presentation, and disclosure in the financial statements. Although there have not been significant changes to the requirements for lessors, the guidance includes extensive commentary of this area.

Although changes will not have an effect until the 2020/21 financial statements, CIPFA/LASAAC consulted in the summer of 2018 on amendments to the *Code of Practice on Local Authority Accounting for IFRS 16 Leases*.

The standard is expected to have a potentially significant practical and financial effect for local authorities, and it was considered that early notice of the technical requirements was advisable.



## Edward Oliver obituary

Edward Oliver passed away after a short illness on 30 December 2019, aged 74. He worked in both the financial and public sectors and he was among the cleverest of his generation, while being the most unassuming.

Eddie had tremendous and original thinking skills, taking nothing for granted and going back to expose and explore the essentials of a challenge. He was an inspirational leader, a great communicator and connector – at ease with everyone.

He spent his first 18 years of his career in central and local government. Positions held included assistant town clerk for the London Borough of Southwark, assistant director of finance for the Royal Borough of Kensington and Chelsea, and economic policy adviser to the London Borough of Hammersmith and Fulham.

Eddie later joined the London Docklands Development Corporation as director of finance, later promoted to deputy chief executive, and was part of the team that developed Canary Wharf and the Docklands Light Railway. Alongside this, he was instrumental in sponsoring the 1984 USSR v World chess match and three years later the Garry Kasparov v Nigel Short TV chess match at London's Hippodrome.

Following on from LDDC, Eddie spent 15 years as a partner with KPMG, during which time he held a number of senior positions, including member of the UK Board, chairman of the firm's consulting practice and board sponsor for corporate social. Eddie led many consulting assignments for clients in the private and public sectors. He had expertise in the areas of strategy, organisational development, people development and operational and financial management.

Having built a hugely successful career, Eddie retired at age 57. However, this didn't slow him down. He became chair of the Pool of London Partnership, a local regeneration agency for the area of London between Tower Bridge and London Bridge. He also chaired the strategy group that steered the preparation of a strategy and action plan for the London South Central area under the government's city growth strategy programme. Later, he was vice president and webmaster of the Brain Trust, a charity founded to maximise the ability of every individual to unlock the vast capacity of their brain.

Eddie was held in high esteem and much liked and respected by all who worked with him. He will be dearly missed by his wife Gill, his two children, his many friends, family and former colleagues.



Edward Oliver

## Meet the CIPFA members

Every month, our newsletter *Membership Matters* features an interview with a CIPFA member. CIPFA members come from all walks of life and have their own stories to tell, from students just starting their careers to senior managers with many years' experience. The interview gives each person an opportunity to reflect on their career and their reasons for choosing CIPFA membership, as well as including some more light-hearted questions such as their ultimate dinner party guests.

All of our past interviews can be read on the [Meet the CIPFA members](#) page, where you can see some of the range of different career experiences and trajectories among our members, as well as some great recommendations for books and films for anyone working in public finance!

We are always looking for members who would be keen to share some insights into their life, career and interests. If you would like to be interviewed for a future edition of *Membership Matters*, please contact [editorial@cipfa.org](mailto:editorial@cipfa.org).

## CIPFA Fellowship Annual Lecture

Our annual CIPFA Fellowship Lecture 'Overcoming Elitism – Social Mobility in Public Service' will take place on Wednesday 29 April. Please refer to the [event](#) page for updates in light of the current situation.

Our annual lecture for Fellows of the Institute provides a fascinating insight into contemporary public finance strategy, planning and politics as well as offering an evening of education and networking.

## Reminder about key changes to CIPFA's CPD scheme

As you'll be aware, CIPFA's updated CPD standard came into effect on 1 January 2020 to address the current and future development needs of CIPFA chartered members. Here's a summary of the key changes to CIPFA's CPD scheme:

- The scheme has been simplified, with one level for all CIPFA members.
- Recording CPD will now be done on an annual cycle, which should make it easier for you to manage your CPD and CIPFA membership.
- Recording of both CPD hours and learning outcomes – a learning and development record template is available for you to download and use to document your CPD activity.

The CPD guide has also been updated to reflect the changes to the scheme. This guide is a useful tool in helping you learn about the requirements of the scheme as well as providing tips on recording your CPD activities. Further details about the CPD scheme, CPD guide and learning and development record template visit: [www.cipfa.org/cpd](http://www.cipfa.org/cpd)

Permanent secretary at the Department for Transport, Bernadette Kelly CB, will be drawing on her experience as a long-standing civil servant, and as civil service social mobility champion.

The lecture will be held at CIPFA's Mansell Street head office in London, commencing at 5.30pm, followed by a drinks reception and an opportunity to network with other CIPFA Fellows.

Fellows based outside of the UK who are unable to attend the lecture in person

## Supporting your CPD

### 10% discount on accredited training

To help members get the most out of their CPD with CIPFA, we're offering a 10% discount on our range of accredited courses.

More details about our training [can be found here](#).

### ManagementDirect

This comprehensive leadership and management online resource bank is exclusive to our members – featuring over 12,000 learning resources and tools to support you with your CPD and career development.

[View more details here](#).

will have an exclusive opportunity to view a recording of the full lecture shortly after the event.

CIPFA Fellows can [book their complimentary place here](#).

**Please note we are currently reviewing our events due to COVID-19.**

**[Click here to read CIPFA's latest COVID-19 statement.](#)**

## Regional news

### CIPFA NE Inspiring Women event

The second 'Inspiring Women' event was held at Northumbria University on Tuesday 28 January, bringing together delegates from several backgrounds and sectors. Attendees heard from many speakers who talked about their work, careers and personal experiences, providing very useful tips to empower delegates to achieve their goals. Some clear themes emerged from the event including the importance of mentoring, volunteering, and seeking opportunities outside of work such as trusteeships, and what we can learn from history about the courage and determination of other women in the North East.

After a brief introduction from Judith Savage, CIPFA NE past president, Jaki Salisbury started the day taking everyone through her career path including setting up a new unitary council in Bedfordshire. The next speaker, Lucy Winskell OBE from Northumbria University, following a similar theme, gave an informative insight into her career to date with messages echoing those from Jaki.

The Rt. Hon. Baroness Joyce Quin provided a fascinating snapshot of her book *Angels of the North – Notable Women of the North East*, profiling historical figures from suffragettes to MPs to local heroines. The last session of the morning was presented by Charlotte Windebank who discussed challenges she has faced, from humble beginnings on a boat on the Tyne to running her own business helping connect young entrepreneurs with established business people.

The afternoon started with breakout sessions exploring issues and solutions facing women in the workplace. Delegates then reconvened in the main room for the final two sessions. The first, by Jo Smith, centred on career tips from



Baroness Joyce Quin

her experience as a partner in a large accountancy firm. The final session of the day by Sarah Salter provided an entertaining introduction including music and dancing, which then moved on to a talk about coaching and an overview of the Japanese concept of 'ikigai', or 'a reason for being'.

The event was a success and delegates felt genuinely inspired and motivated when they left at the end.



Jaki Salisbury, CIPFA NE President



Charlotte Windebank

**CIPFA North West Northern Group autumn seminar**



CIPFA NW Northern Group at Kendal

CIPFA North West’s Northern Group met in Kendal in October for their autumn seminar ‘North by North West – Future in Mind’, chaired by Ian Cosh.

Clair Alcock, Bluelight Senior Pensions Advisor, LGA, opened the event with an informative talk on the factors affecting the pension schemes in operation for the fire and police services. Clair provided a brief overview of her work with the LGA helping to advise stakeholders in the management, governance and administration of pension schemes to public sector organisations. She also gave an insight into current issues around public sector pensions, including recent legal cases that could have significant repercussions in this area.

Gary Hall from Chorley Borough Council gave an overview of health and wellbeing and the issues the health sector is currently facing, and what they hoped to achieve from change. Critical issues include the ageing population, a fragmentary healthcare system, workforce challenges and not making best use of resources. Proposed changes would involve improved co-ordination, primary care networks, and

delivering better emergency and urgent care services.

Gary then addressed the people in the room and how issues within the healthcare system would affect the way accountants work. He advised we need to start building cases on preventions and will be seeing more collaborations. Investment in encouraging people to make lifestyle choices is key, and we will need to invest now to see benefits in 30 years’ time.

Caroline Newman from CIPFA took the afternoon slot, delivering a presentation on accounting standards and their impact on financial accounting. Caroline discussed IFRS 9 *Financial Instruments*, IFRS 15 *Revenue from Contracts with Customers* and the new IFRS 16 *Leases*, giving detail on the particular effects of each.

The final part of the presentation was on the introduction of the Financial Management Code and the Financial Resilience index. The FM Code was published in November 2019 to help demonstrate financial sustainability and improve financial planning, with compliance from 2021/22.

Shane Byrne from the Department for Work and Pensions was the final speaker of the day. Shane gave the group an insightful presentation on the rollout of universal credit and its aims, with the next phase taking place in 2020–23. It was clear that the department’s goal was to help people in to work and help them then remain in work.

Our next seminar will be in spring 2020.



Ian Cosh (left) with Shane Byrne

**CIPFA South West Trainer, Emma Grant, on her unexpected teaching career**

After 20 years working in local government finance, this is my story of how I found a love for training and teaching accountancy, rather than continuing my working life as a public sector accountant. With eight teachers in my family, you could say it was inevitable that I would end up going down the teaching route too. It's easy to say this now, of course, but there was a time when I would have said, no way, never!

*My accountancy background*

While at Exeter City Council I worked my way up from a finance admin role, via assistant accountant to systems accountant, the role I really relished, gaining my qualifications along the way. I achieved my AAT qualification in 1999 and my CIPFA qualification in 2012.

Over the years, my accountancy responsibilities increased, and later on, I was allocated management accountant responsibilities and started working with senior managers and providing advice to them as required.

*My training background*

This all ticked along quite nicely until I was seconded into my systems accountant role and my job became a lot more interesting! It was here that I found my passion for training and teaching others. I was on the project team for implementing a new finance system; I would be working with a wide range of staff and training over 80 end users.

As well as learning all about the new system, I was also involved in writing the training manuals and creating the training sessions – and loved every minute of it.

After the system went live, I continued my training role and made it my own; creating further manuals and training courses to run. I soon found a real joy in teaching – more than I had in my accountancy role!

In July 2013, I achieved the PTLLS (Preparing to Teach in the Lifelong Learning Sector) teaching qualification, a short teaching course aimed at the post-16 sector. I wanted to take this course to improve my training skills and to open up more opportunities to move into teaching. In December 2013, I took voluntary redundancy from the council to move onto pastures new.

*My teaching story*

I have been teaching AAT for over four years now. During this time, I have tutored around 300 students and seen them through nearly 500 exams. I also launched my own business – Learn to Finance Ltd. I decided it was time to take charge and create my own teaching career.

Working for myself has also opened up many other opportunities to me that wouldn't have previously been possible, including getting involved with a local charity in Exeter and latterly becoming a trustee for them.

Although I am an AAT tutor, I am also a member of the CIPFA South West Regional Council. We all share the same passion for extending our reach throughout the South West and building stronger links between CIPFA SW and the local AAT Branches.



Emma Grant

## Republic of Ireland – Changing landscapes

It has been a busy time at CIPFA (ROI) and our collaboration with Chartered Accountants Ireland continues. We held a joint public service finance conference in November and kicked off 2020 with a CPD event in January. Catherine Allen (partner at Mason Hayes & Curran) gave an insightful talk on data sharing in the public sector and the Data Sharing & Governance Act of 2019. We were delighted to see attendance numbers exceed the expected at this early morning event.

It is certainly evident that changes in data protection law are a key area of focus for colleagues across government departments and public offices and that accountants and auditors are maintaining CPD on legislative changes on an ongoing basis. The era of bean-counting has long since passed and members continually show their commitment to compliance (and task remits beyond the mere balancing of accounts). Given the detailed questions posed on the day and the calibre

of speaker and attendees alike, it is heart-warming to see our network and collegiality grow.

We would like to take this opportunity to thank Catherine for obliging CIPFA on the day and to all attendees who made their way to Chartered House in the early hours of a cool January morning.

Elsewhere, we are in the middle of general election results this side of the water, and the outcome in terms of new government make-up remains to be seen. We are extending best wishes to civil and public servants, who display courage, tenacity and commitment during and post government changes.

Similarly, we are also thinking of colleagues in the UK at this time and are, as ever, committed to the ongoing effort that CIPFA makes at home and abroad to underpin best practice public finance and in the most challenging of times.



**Covering Commercialism in the South West**

In the last five months, CIPFA South West has been very pleased to team up with Grant Thornton and Greg Mal, CIPFA’s regional business development manager in October 2019, and BDO in Bristol in February 2020, on the subject of commercialism. We achieved a real mix of participants from most parts of the region across both events.

The event on 9 October was led by CIPFA trainer Gareth Batterby, and covered a wealth of areas including the idea of commercial awareness, the scope of internal and external relationships, and factors effecting an organisation and the environment in which it operates. Gareth also took us through the idea of contestability as a driver for effective service delivery. We also covered business, commercial, risk and asset strategies, and the need to analyse the current organisation and its cultural preparedness for a commercial approach.

Gurpreet Dulay, a BDO senior consultant, then arranged a follow up session on commercialisation, ethics and contracts, held on 5 February at the BDO offices in Bristol. Here, Gurpreet set the scene of current income generation activity in local government, following up with analysis from BDO on reasons for failures and avoidance strategies.

Following on from a session on ethics and CIPFA guidance and support in this area, we had an excellent session from Geoff Tucker, sales director for Norfolk County Council’s commercial organisation, NORSE. The council set it up in 1988, and it now operates across England and Wales. It even has a joint venture, Devon Norse, in the South West, with services covering five of our SW counties.

The event concluded with a presentation from BDO partner Oliver Back. Oliver covered driving value



Delegates at the SW Commercialism event

beyond compliance and advocated the life cycle management of the contract to boost success. It was particularly interesting that he raised the misalignment of contract management and procurement functions. This can lead to weak commercial management and inefficient contract use. He was an advocate for the role of the contract manager moving from administration to that of a value driver, and echoing how finance push heavily in that transformation for ourselves to be seen as chief bean counters, transformation agents and value drivers!

BDO, Grant Thornton and CIPFA, through the regional business development managers, are very happy to support the regions to put these local events on. Our partners and sponsors are valuable not only in putting on events, but in their continued support in providing speakers for topical subjects. If you are in any of our public sector areas in the South West, we would really welcome the opportunity to work together to put

on a CPD event local to your area in our vast and wonderful region.

Please contact [Christina Earls](#), CIPFA SW President.



Networking opportunities for regional members

## Student news

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### Supporting student wellbeing with pet therapy

In a time of increasing awareness around maintaining good mental health, CIPFA SE Student Network and CETC have been working together to pilot some wellbeing events for students. It is crucial that our students are equipped with ways to reduce stress as they study hard to obtain their CPFA qualification and prepare for their future careers in public finance.

Wellbeing and more holistic approaches to health are becoming more of a priority for communities around the world, with some countries such as New Zealand even preparing budgets on the basis of promoting national wellbeing.

The previous edition of *Spreadsheet* highlighted a session on emotional intelligence run by Alex Wakeham for students based at Mansell Street in London. The focus was on techniques for managing emotions and behaviours around exam time. Some further recordings from Alex are also going to be made available for current and future students, to provide guidance on coping mechanisms when dealing with stress.

In December, CETC provided some 'pet therapy' with a visit from a very friendly dog in the week before the exam session. Students were able to take a break from revision and spend some time with the dog – and from the picture it is clear this was a popular way to take some well-deserved time off!



CIPFA students enjoy a study break



## Events

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### PERSPECTIVES ON FRAUD: INSIGHTS FROM LOCAL GOVERNMENT

Join expert speakers from the CIPFA Counter Fraud Centre and beyond for a special one-day summit examining fraud in local government on Tuesday 31 March in Birmingham.

Book now: [www.cipfa.org/training/c/ccfc-perspectives-on-fraud-insights-from-local-government-20200331](http://www.cipfa.org/training/c/ccfc-perspectives-on-fraud-insights-from-local-government-20200331)

### INTRODUCING THE CIPFA FINANCIAL MANAGEMENT CODE

4 June, Bristol

[www.cipfa.org/training/i/introducing-the-cipfa-financial-management-code-20200604](http://www.cipfa.org/training/i/introducing-the-cipfa-financial-management-code-20200604)

15 September, London

[www.cipfa.org/training/i/introducing-the-cipfa-financial-management-code-20200915](http://www.cipfa.org/training/i/introducing-the-cipfa-financial-management-code-20200915)

### TREASURY MANAGEMENT CONFERENCE

27 March, London

[www.cipfa.org/training/c/cipfa-treasury-management-conference-2020-20200327](http://www.cipfa.org/training/c/cipfa-treasury-management-conference-2020-20200327)

### PUBLIC FINANCE LIVE 2020

8–9 July, QEII London

[www.cipfaannualconference.org.uk/](http://www.cipfaannualconference.org.uk/)

### Dates for your diary

- Finance Conference, 1 May, London
- Internal Audit Update, 1 June, London
- Property Conference September
- Insurance Summit, 15 October
- Governance Summit, 1 November, London

**Please note we are currently reviewing our events due to COVID-19.**

**[Click here](#) to read CIPFA's latest COVID-19 statement.**

### Upcoming training courses

#### DIPLOMA IN CORPORATE GOVERNANCE

starting 26 March 2020

[www.cipfa.org/training/d/diploma-in-corporate-governance-2020--scotland-20200326](http://www.cipfa.org/training/d/diploma-in-corporate-governance-2020--scotland-20200326)

#### DIPLOMA IN COMMERCIAL SKILLS

starting 31 March 2020

[www.cipfa.org/training/c/diploma-in-commercial-skills-20200423-london](http://www.cipfa.org/training/c/diploma-in-commercial-skills-20200423-london)

#### DIPLOMA IN CONTRACT MANAGEMENT

starting 7 April 2020

[www.cipfa.org/training/d/diploma-in-contract-management-20200407](http://www.cipfa.org/training/d/diploma-in-contract-management-20200407)

#### DIPLOMA IN FINANCE BUSINESS PARTNERING

starting 17 April 2020

[www.cipfa.org/training/c/finance-business-partnering-2020--c29-london-20200417-london](http://www.cipfa.org/training/c/finance-business-partnering-2020--c29-london-20200417-london)

# Who's who at CIPFA

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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 +44 (0)20 7543 5600 and ask for the relevant person.

## Academies

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