



REGIONAL NEWS *(ISSUE 5)*

[Section 1](#) – Welcome from the President

[Section 2](#) – Upcoming Events

[Section 3](#) – CIPFA Updates

[Section 4](#) – The Last Six Months

[Section 5](#) – Students (an article by Lucy Glister-Byers “The story of a struggling CIPFA student”)

[Section 6](#) – “Not Just Council Finance” – Career View: Tom Clarke

[Section 7](#) – Secret Accountant “Guilty Pleasures”

Here at CIPFA North East we would love to hear from you with comments, queries and suggestions, please get in touch via the contact links throughout this newsletter.

Section 1 – Welcome from the President



Welcome to the 6th edition of the CIPFA North East Newsletter.

My first year as President has been an unusual one – we were still living under COVID restrictions when I took over the

reins, meaning the AGM and subsequent events were held online – something we’ve become quite used to now. However, we were fortunate enough in the second half of the

year to be able to host the CIPFA Autumn Forum, welcoming CIPFA colleagues from across the UK, and our 10th Annual Conference face to face in a safe manner.

These events were a great success and demonstrated just how much we had missed the interaction that in-person events bring – we can’t wait to welcome you to more events this year!

This edition of the newsletter includes another article from our secret accountant as well as an inspiring piece by a recently qualified North East member Lucy Glister-Byers, who opens up about her struggles during studying for the qualification and the importance of reaching out for support.

Thank you for continuing to read our newsletter and please feel free to get in touch if you have any feedback.

James Charlton
CIPFA North East President

Section 2 – Upcoming Events



AGM Wednesday 23rd March 2022 at 5pm

This will be a virtual event, *with more details to follow*.

A series of virtual bitesize sessions will take place in the run up to the AGM, *more details to follow as speakers are confirmed*.

Details will be posted to our website and social media channels

CIPFA North East Annual Dinner (Sponsored by Engie) Friday 22 May 2022

Crown Plaza Hotel, Newcastle upon Tyne

OTHER EVENTS

Our events team are hard at work developing a range of events to take place in 2022 and we very much look forward to welcoming you to more face to face events this year, although we will continue to offer virtual events which we've learned provide value and flexibility to our events programme.

Events being planned include a return of the Professional Update event in June, the prestigious Inspiring Women event in September and the North East Annual Conference in November.

Women In Leadership Event

We are currently working on our next Women in Leadership event and putting plans in place for what we hope will be an inspiring, engaging and interesting event. If you'd like to be involved in any way, please contact Judith Savage Judith.savage@newcastle.gov.uk

Please contact northeast@cipfa.org with any questions or suggestions and feedback on events.

[Keep up to date with CIPFA events in the North East](#)

Section 3 – CIPFA Updates

Make sure you visit [CIPFA](#) to check out their guidance, all articles provide insight and support, definitely worth a visit.

For those that subscribe to the Technical Information Service ([TIS Online](#)) there are several updates to note, such as;

[Sources of Transport Funding](#)

[Street Works](#)

[Local Government constitutions](#)

[Financial Management](#)

[Corporate Governance and Risk Management](#)

You will find more information in the [CIPFA Thinks](#) and [CIPFA Speaks](#) part of the website.

As well as many lively discussions on the [forum](#) for you to join....

Section 4 – The Last 6 Months

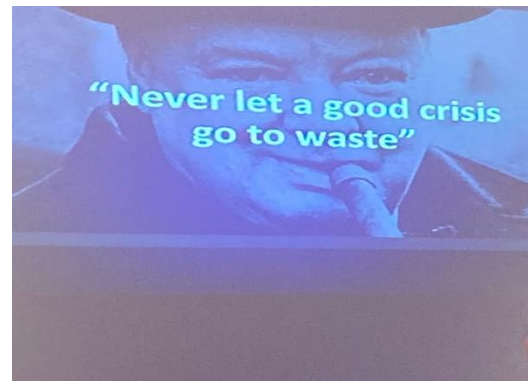
CIPFA North East's 10th Annual Conference

The tenth CIPFA North East annual conference was held on Friday 12th November at the Crowne Plaza hotel, Newcastle-upon-Tyne. Over 70 people attended the conference including many colleagues from across the UK regions who had arrived the previous day for the CIPFA Regional Forum, also hosted by the North East.

We opened with a welcome from the current CIPFA NE president, and host for the day, James Charlton. The first presentation was delivered by Professor Andy Hardy, Chief Executive Officer at University Hospitals Coventry and Warwickshire NHS Trust, and immediate past CIPFA president. Andy provided a national CIPFA update and summarised the recent financial landscape as well as the future challenges the public sector faces in light of the pandemic, and significant funding challenges facing the sector.



Next up was Michael Brodie, Chief Executive of NHS Business Services Authority. He presented eleven of his 'takes' from the recent pandemic and provided some real life and thought-provoking ideas for attendees to consider. Following Michael was John Fenwick, Director of Finance and Resources at Nexus, who delivered a detailed presentation covering many aspects of the well-known Metro System. Delegates were taken on a journey (excuse the pun!) from the initial concept through to the present day and into the future including infrastructure renewal and fleet replacement.



After a short lunch break, sessions continued with a fact-filled presentation from Claire Thompson, sustainability lead at Livin Ltd. She presented stark facts around climate change and global warming, consequences of this, likely effects of inaction and what can be done in mitigation. A real wake-up call to all to do whatever possible to help in this time of crisis.

Next up Tony Gates, Chief Executive of the Northumberland National Park Authority, gave an insightful look into the organisation. Covering recent challenges faced by budget cuts leading to centre closures and the subsequent impact on visitor numbers, the authority are now looking to the future. Helped by official government advice to exercise outside, visitor numbers have increased significantly. Using 'recover together' as a key concept encompassing economy, people, nature, climate and place the organisation faces a positive future despite ongoing funding pressures.

The penultimate session, presented by Paul Dunn (Executive Financial Director), Sarah Rose (Divisional Director Northumbria NHS Manufacturing Innovation Hub) and Paul Price (Commercial Director) took delegates through a fascinating insight into the creation of a PPE manufacturing hub at the height of the

Pandemic. Faced with worldwide PPE shortages a factory was set up and running within six weeks, producing large volumes of equipment for use by health care professionals across the region. The hub continues to go from strength to strength, producing goods at a fraction of imported prices, gaining increased commercial orders and venturing into new service areas.

The final session was delivered by Michelle Percy, Director of Place at Newcastle City Council. Michelle explained the impact COVID-19 has had on the city and plans for recovery based on a place-based

approach, this including skills, business growth, the future economy, community and place and digital and transport. Examples of recent schemes and investment in the city, by both



government and private enterprise, were covered illustrating how Newcastle City Council is emerging from the Pandemic and looking to the future with ambitious place-based plans.

The day ended with attendees taking the opportunity to catch up and network over drinks with CIPFA friends and colleagues they had not seen face to face for two years. There was evident enthusiasm for safe face-to-face gatherings and we look forward to welcoming members to more events this year.



Section 5 - Students

“It is our determination not our failures that make us successful” The story of a struggling CIPFA student.

I started my learning journey with CIPFA in early 2016, I completed my qualification in October 2021 and I'm proud to say I'm now a qualified CIPFA member. The eagle eyed among you will notice that it took me 5 years (yes 5) to finish my studies. However, it appears I'm not the only one whose studies have extended beyond the usual 3 years. According to the February 2022 issue of PQ magazine 48% of CIPFA students are still trying to get qualified five years after starting their journey.

I was new to finance when I started my CIPFA journey, I'd not studied accountancy at university or completed AAT and I'd never heard of a "T" account or a credit or debit, so it was a steep learning curve when I started studying. It had also been some time since I'd sat any formal exam or undertaken any kind of structured learning. Thankfully, the support of training managers and other students at the time got me through my first 4 exams unscathed. There were times when I felt incredibly overwhelmed or incredibly stupid, but I managed to get some decent passes.

Things changed for me when I suffered a bereavement and I started to fall behind my classmates with my studying, it didn't help that the subject (Public Service Financial Reporting) wasn't one of my strengths at the time. Needless to say, this was the first exam I failed, and this hit me hard, in fact it took me 3

attempts to pass PSFR, but I got there in the end. From there on my exam success was patchy and often influenced by changing and challenging personal circumstances.

Each time I'd come to sit an exam I felt I'd put in the required effort but sometimes it just didn't click on the day. I think it's important to say here, I'm not making excuses for myself, but I've noticed that when other students have also failed exams it's never been down to a lack of effort. This means that exam failures feel more personal, and it can be difficult to dust yourself off and keep going.

Some things that helped me to continue on my learning journey when I felt like giving up included:

- The support of other students, this was especially important at the Strategic stages. I found a couple of students from other regions that I felt comfortable sharing my insecurities and inadequacies with and together we pulled each other up to pass the case study.
- The support of my employer and line managers, who were incredibly understanding of my personal circumstances and didn't pressure me to complete my studies on their timetable but allowed me to set my own. They also didn't make me feel incompetent or incapable when I had failed an exam and instead focused on the positives.
- CIPFA's wellbeing webinars, I attended one of these during 2020 when I was thinking of postponing my Strategic Public Finance exam, I was struggling with my confidence, and I didn't want to sit an online exam (at that time it was early into the pandemic, and we didn't know how long it would last). However, after attending the webinar my attitude changed and I decided to make the most of the time I had leading up to the exam which led to me passing the exam much to my surprise. Also CIPFA's Training Delivery Manager, Alison Sweeting was especially supportive towards the end of my qualification.

Recently, I've noticed a trend on LinkedIn of people generally celebrating and promoting their first time passes, and this is not intended to belittle that fantastic achievement. My comment is to highlight that although this may seem like the norm it's more likely to be the exception, we're just not as open as talking about our failures. When I open up about failing exams to others, they share their experiences and often a lot of really successful people failed one or more of their CIPFA exams.

I'm proud of my learning journey, by failing some exams it's given me strength, determination, grit, empathy, compassion for others and in some cases, it's even led to better retention of the syllabus content. This article is for any student out there who is struggling or who has failed an exam, it is temporary and there is support available to you if you want it.

Article by Lucy Glister-Byers
Senior Accountant
Newcastle City Council.

Additional support can also be sought from the following sources:

- For any apprentices, the Apprenticeship team (apprentices@cipfa.org)
- CIPFA have some trained Mental Health First Aiders for any mental health emergency (not trained professionals but able to listen and support until emergency mental health help turns up) – mhfastudents@cipfa.org
- Designated Safeguarding Officers if anyone has any safeguarding, prevent or welfare concerns (the DSOs are sarah.shreeves@cipfa.org; alison.sweeting@cipfa.org; helen.woods@cipfa.org and mohit.pun@cipfa.org)

Customer Services	For help with course administration issues	☎ 020 7543 5600 ✉ cetc.enquiries@cipfa.org
The Student Support Team	For help with examinations	☎ 020 7543 5600 ✉ studentsupport@cipfa.org
Training Delivery Manager	For any concerns about your training courses	☎ 020 7543 5622 ✉ trainingdeliverymanager@cipfa.org

We would like to encourage students to feedback any topics they would like covered in this section. Please get in touch at northeast@cipfa.org

Section 6 – “Not Just Council Finance” – Career View: Tom Clarke

Tom Clarke looking back over his career development, and the rather unusual route it has taken, especially over the last year and a half:

During late summer 2020 I was invited to become a Director in a firm of Chartered Accountants and Registered Auditors, H&M Ltd, where I have worked since September 2018. Based in my hometown of Skipton, North Yorkshire, the firm currently has two Directors and 18 employees. We have over 1,500 clients, including limited companies, partnerships, sole traders and individuals. Whilst we provide the usual accountancy services such as annual accounts, tax advice and returns, bookkeeping and audit services, we have also started to provide management accounts information and budgeting

- something I have introduced following my time with Nexus.

A good proportion, if not the majority of our clients, have strong links to agriculture. Given that my upbringing was on a dairy farm on the outskirts of Skipton this allows me to combine my accountancy skills and my interest in farming perfectly, plus my family name is fairly well known in the local area and with many of my firm’s clients.

My path to this point has been quite unusual. Back in 2008 I applied to become a graduate finance trainee at Nexus. My intention was always to head back to the farm after my Economics degree at Newcastle, but I had settled very well in the North East whilst at the University of Newcastle upon

Tyne and this opportunity was far too good to pass up. My second day in employment was spent at New College, Durham, where I started my CIPFA training, so straight into the thick of it.

After 10 years at Nexus I had achieved more than I could imagine. Professionally I had jumped into every challenge that came my way, I had developed analytical skills and interpersonal skills that would later become invaluable and learnt a great deal about how the world really worked. The highlight reel includes the involvement in several flagship projects, Ticketing and Gating at Metro stations, the Metro Asset Renewal Plan, the North East Smart Ticketing Initiative (NESTI) and of course the Quality Contracts Scheme (QCS) to name a few. During the QCS project I was cross-examined as an expert witness under oath by two barristers whose primary aim was to undermine my financial modelling which underpinned the whole Scheme. Additionally, in 2017 I prepared the financial accounts for Nexus for the first time and assumed management a small team of accountants. This life was a far cry from milking cows at the crack of dawn each morning. The most important aspect of these 10 years was the support and guidance that I was lucky enough to be afforded. At each step of the way there was the perfect mix of mentorship, feedback and trust.

Outside of Nexus things had started to develop as well. My wife and I had our first son in 2017, and both being from Skipton we decided to move back to give our family an upbringing that we both had; close to family, based in Yorkshire and also in our case living on the farm. At this point I had a slice of luck come my way. H & M Ltd, the firm of accountants that I visited for a week of mandatory work experience during my secondary education, had advertised for a senior accountant in a rare recruitment exercise. Ten years to the day after I started at Nexus, I started at H & M Ltd. It was with a heavy heart that I left Nexus and the North East.

When I joined H&M Ltd in 2018 there were two Directors. A third was to follow me into the firm in October 2018 as the intention was that there would be three Directors at H&M Ltd. The carrot on the stick for me was that if I proved my worth over five years then there would be an opening for a Director

spot. By this point the longest standing Director would have retired, I would have built up the experience required and would have been introduced to the clients that I would be looking after. This plan fell at the first hurdle. The newest Director lasted barely a year then suddenly resigned and the retiring Director announced his intention to resign in Summer 2021 due to the COVID-19 pandemic. This would leave just one Director, and therefore my opportunity came sooner than expected. By mid-2021 I had gained my practicing certificate and completed the necessary paperwork required to become a Director having acted up in the position for over a year.

These last 18 months has been a true challenge to be completely honest. As everyone in the profession has found we have had to fundamentally redesign our work processes to deal with the pandemic and stay up to date with the legislation, the grants available and the loan schemes. This was alongside having our own issues in keeping the office open and ensuring the service quality was maintained. The pandemic aside, the ride has been a very steep learning curve. From preparing accounts for clients on a daily basis I now see the client and discuss their business and personal financial status with them. Additionally, within the last 18 months my firm moved into a new office, we digitalised our entire archive of records in line with GDPR, expanded our client base, recruited three new employees to accommodate the growth and helped our clients comply with the Making Tax Digital (MTD) and other legislative changes. Oh, and my youngest son was born in June 2020.

I often look back on my career to date and wonder where the time has gone since my first day at Nexus and the day at Durham New College. But I haven't forgotten any of the experiences and lessons learnt along the way. I remember the nerves before presenting those first Committee reports, hours staring at endless spreadsheets, the elation and satisfaction of gaining the qualifications, the friends I've gained and wisdom received. It has all been worth it!

Tom Clarke
Director, H&M Ltd

Section 7 – Secret Accountant



Secret Accountant - “Guilty Pleasures”

One thing I was adamant I would never become was an “old fart”. You know, the mature sensible individual who only turns on the TV at 6.00 pm (and not before!) during the week to watch “The News” but not for the slot-filling detritus before, for which read Neighbours or Pointless depending on your age.

At this point I must digress, and solicit your opinion on two key questions of national importance....

- Is Alexander Armstrong the smuggest man on television? and
- Is there a more aptly named TV show than Pointless Celebrities?

Having already had a pop at Ben Shepherd, you would be forgiven for thinking “The Secret Accountant” has a particular grudge against teatime TV (don’t you get too cosy Mr Bradley Walsh but word limits dictate you’re safe ...for now!) but in truth none of the aforementioned 4.00 to 6.00 pm viewing would be a guilty pleasure of mine. The only shred of remorse is that I do remember when this slot was reserved for Childrens’ TV, which appears to have been driven from mainstream television altogether. Which were you by the way – Blue Peter or Magpie?

Editorial Note Dear S.A ...you are aware we are rapidly losing the attention of any readership under 40...

Ok time to spice things up a bitconfession time! I have developed a bit of a guilty pleasure while required to work from home – and I am worried it may result in me being classified as “old fart” material. Radio 2 on in the background with that nice Ken Bruce...and more specifically at least a couple of times a week, around mid-morning coffee, if possible I try to go head to head with the Pop Master contestants.

Pop Master is possibly the most “listened to” piece of mid-morning radio as each morning from 10.30, two contestants take time out of their busy mornings to tackle the “bonus categories” and see how many they can score out of the maximum 39 – 39 and not just a digital radio but an invitation behind the velvet rope to join the lofty heights of the Pop Master Champions League may beckon.

One of the contestants always plays in a band in local pubs too – I wished I had at some stage done something vaguely musical. It strikes me that playing the guitar, whether round a camp fire or in a bar on a Friday night was a far more productive way to impress a potential partner than being able to draw up a Trial Balance! But you may know differently

It may be a wish too far for my bucket list at this stage but anybody seeking a front man with absolutely no musical talent but positively a surfeit of stage presence (and weight too !) please get in touch via the editor. Think Bez without the natural rhythm!

Back to the quiz, I usually hold my own, while occasionally doffing my metaphorical cap at a contestant so accomplished that nothing from the 1960’s to the current charts holds any terrors. I tend to mentally switch off and return my gaze to my spreadsheet when Ken commences “Who, in 20 __”, whereas if the year in question commences 19 __, I at least feel I have a chance! More Adam Ant and his “dandy highwayman” than Clean Bandit am I !

Does this musical intolerance make me a bad person? Or potentially even worse, out of touch! I promise to try harder and tune in to Top of the Pops next Thursday!

At that next social occasion or works outing, you may want to suggest a game of “guilty pleasures” to stimulate conversation and get people talking (it’s been a while after all!) but please do establish where the boundaries lie....HR have enough on their hands at the moment overseeing a phased return to the workplace!

Boundaries are important of course... and not just in cricket!

Just look what can happen when introducing a little cheese and wine, and perhaps a quiz too solely for staff morale of course

THE SECRET ACCOUNTANT!

Follow us

