

# Regional Forum – Shared Challenges; Shared Success

## 1. Location of events – actions and ideas

- Host events in locations that are easily accessible for both cars AND public transport, for those who don't or can't drive – important to be inclusive.
- Use novel/ interesting venues, ideally related to the public services that are points of interest or places people wouldn't otherwise normally visit. If a tour is also available, that can be a good networking opportunity for attendees.
- An interesting venue might also help attract sponsorship.
- Play with the timings to see what works best, depending on the event. For example, if at an interesting or novel/ venue, consider hosting on a Monday or Friday and encourage people to stay the weekend to make the most of the visit.
- Play with formats to see what works best, again depending on the event. Consider breakfast briefings or lunch and learn sessions, which can run really well in urban areas and won't require so much 'out of office' time.
- Consider running webinars or online events too.
- Consider recording/ filming events and then sharing recordings via platforms like YouTube or Vimeo – especially useful for those who couldn't be there on the day or for those who are unsure about attending their first event. This could help address geography challenges and attract new members.
- Film/ record audio from key annual and regional conference sessions and share recordings, perhaps charging a nominal fee to watch and access.
- Pre-record sessions with speakers who can't attend events in person and then share these videos at the live event. Just because a really great speaker can't be there on the day doesn't mean they can't be included!
- Would need help/ advice/ support from Mansell Street on this, including access to relevant technology, and to understand what's possible/ available.
- [From Victoria: Something that's just occurred to me as I'm typing – podcasts (audio recordings shared via a platform like Soundcloud) are another excellent way to share material regardless of physical location. CIPFA's corporate comms team are doing their own on a fairly regular basis, so could advise on this.]
- Accept that some events will attract lower numbers but still value these as perhaps representative of the numbers in these areas – they'll still be worthwhile and the personal contact will be valued by those who can attend.
- Do post-event surveys to capture feedback and suggestions/ ideas for future event locations.
- Some venues offer free parking, which can be a big draw.
- Choice of topic is key – think above and beyond technical/ finance issues. Leadership for example, has proven really popular.
- Don't be so London-centric.

## **2. Marketing/ communications to promote events – actions and ideas**

- For those who have access to it, the dashboard works really well for targeted communications but it needs to be extended across all regions.
- Use personal send aliases, for example 'President' or a named individual instead of just 'CIPFA', this can really boost open rates.
- Social media can be hugely useful to get event messages (save the date, book now etc.) out quickly.
- Be aware that different social media platforms work well for different audiences:
  - Students tend to engage more with Facebook
  - Members/ more senior individuals on LinkedIn
  - Organisations work better with Twitter
  - Employers (and students) use Instagram
- Where possible drop in to college sessions to promote student events.
- Share your forward event dates as soon/ early as possible with your audience so they can save the date.
- Offer early bird prices to secure early commitment.
- In your own organisation, make the most of your relationship with the S151 officer/ other senior staff and ask that they promote CIPFA events on your behalf – sending personal emails to colleagues who might be interested in attending.
- Use workplace intranets to promote CIPFA events.
- Directly email any colleagues that might be interested in attending.
- Make the most of employers to host events – this shares the pressure with them to make the event a success and might help attract people/ members who wouldn't normally attend.
- Plug into your own professional networks and ask for help to amplify event promotion messages, via email or on social media.
- Share regional event calendars for the coming year as soon as possible with events team in Mansell Street, which will help avoid clashes with other events/ conferences and vice versa.
- The process of uploading events to the website needs to be improved and made more efficient – it's currently very cumbersome and can take weeks. It's also important that the event organizer is sent the event link once it's live.
- Have a clear USP for your events – make it stand out and sound a little different from the usual.
- Holding the same event at the same time of year can help – for example, people will expect and plan for a conference if it's always held in September.
- Reward event loyalty – if someone attends a conference one year, offer a discounted place at next year's event.

- In regional emails, cover/ promote upcoming events first and leave write-ups of previous events till later in the email.
- Have a specific events email that goes to employers, highlighting dates and topics to be covered.
- Can Mansell Street provide newsletter/ email templates for event promotion, to improve look and feel and brand awareness? This would really help the regions' admin support.

### **3. Supporting CIPFA's Diversity & Inclusion Strategy**

- Build into how we demonstrate values and professional behaviours – lead by example / use “ethics” model approach
- Consider Branch representation and how to encourage more diversity in volunteers, perhaps through sub-groups, targeted events (eg: women in finance), timing / location of events
- Drop the “Black Tie & Badge” culture and some events
- Dress down for day events
- Considering reverse mentoring / coaching / speed mentoring
- Consider language / culture / conventions: could these be challenged or changed to improve outreach / engagement?
- Promote role models – Case studies?
- Consider diversity of programme / speakers at events
- Set region specific targets (and how to address / monitor / report?)
- Offer free places at specific events for specific / under represented groups and / or free events
- Pride in Diversity campaign / award

#### **4. Improving employer engagement (sectors, professions, professional bodies)**

- Encourage employers to host / support / deliver training (especially through trainees / apprentices)
- Take advantage of other network's agendas
- Ask employers for input into professional articles
- Encourage / market events beyond finance professionals – eg: HR, recruitment, procurement
- Try to organize joint events with other institutes eg: ICAS, CIMA, CIOT
- Focus on relevant topics – HS2, sustainability, wellbeing, climate change, cyber
- Make cross-sectoral Agendas (eg: include health, blue light, audit, housing – not just local government topical issues)
- Establish sub-groups – eg: senior managers group, student sub-group
- Promote events as suitable for “off the job training” (Apprenticeships)
- Approach the “right people” – who is proactive (social media?) and suitably senior on the region?
- Identify other professional events (hosted by firms, or other Institutes) and attend
- Use social media – LinkedIn especially
- Network!

## **5. Raising income / sponsorship & supporting free events**

- Look for freebies / in-kind support – catering, venue – be creative / bold (if you don't ask, you won't get!)
- Ensure you are compliant with CIPFA sponsorship policy / develop own regional one from this
- Compare with other events / regions to ensure competitive / appropriate rates
- Share best practice on what works
- Be clear with potential sponsors – what they would like and what they will get for their money (and ensure you follow through – eg: references in marketing, use of logos, stand at event etc)
- When networking / engaging in discussions with potential venues / sponsors – make sure you are speaking to a decision maker / someone suitably senior
- Ask the Firms! They will often provide a venue free in exchange for a speaker slot
- Consider perception of free events (why is it free?)
- Consider:
  - Taster sessions
  - Breakfast seminars
  - Cancellations / no show (if free)
  - Low charge v. free
  - Limited number of free places (eg: for students?)
  - Early booking discounts

## **6. How to use our data / dashboard effectively**

- A couple of the group to attend the training – good development for younger / student members?
- Other regions who are using it will support / help (if you ask!)
- Make use of the CIPFA email
- Use the dashboard to identify sectors, geographical spread, new students etc and email them directly
- Use survey monkey to ask members what they want (types of events etc)
- Dashboard users could form a network and get together (remotely) to support / discuss functionality etc (CIPFA could also attend?)
- Cleanse the data (can CIPFA support with this?)
- CIPFA – Can we have advice on how to address “opt out” issue (i.e. members may have inadvertently “opted out” and therefore cannot be contacted)
- CIPFA – How do we engage with non-CIPFA members who have registered and attend our events

## **7. Getting more volunteers / admin support...and succession planning**

- Consider paying for admin support
- Vary the approach of meetings – 2 face-to-face, 2 conference calls
- Promote volunteering as “off the job training” (for apprentices)
- Create “Deputy” or junior / development roles – gives volunteers more ownership over tasks
- Always promote volunteering at events
- Use survey monkey after events – ask if delegates are interested in volunteering (and follow up)
- Targeted campaigns to attract volunteers
- Use details of new cohorts to contact directly
- Develop an Employer Information Pack – Introduce the region and the benefits of volunteering
- Maximise social media / website – Blogs etc – keep it up to date “meet the region” etc

## **8. Improving our student engagement**

- Use social media – Facebook, LinkedIn, Instagram, YouTube
- Appoint students as “active leaders” / champions
- Establish a regional student sub-group
- Ask students to contribute to regional articles on website / Spreadsheet etc
- Students to promote volunteering / student group at regional events
- Promote student activity as “off the job training” (apprenticeships)
- Hold a graduation-style event for new members / celebrate success
- Have regional prizes for students / exam success
- Hold social events as well as student development events
- Student volunteers / group members to attend college classes (first week) and promote the network and introduce themselves
- Ask students: Opt-in Whatsapp Group (encourages inclusion of remote learners)
- Regions to share best practice
- Regional President to write to all new students on the region (use Dashboard)
- Consider timing of events – eg: avoid exam dates / revision periods
- Regions need to know when new cohorts start and who they are