

# Regional Development Plan 2022

Region: South East

## Section 1

### *Committee contact information*

<b>Role</b>	<b>Full name</b>	<b>Email address</b>	<b>Telephone no.</b>
President Vice President Junior Vice President	Kathryn Long John Barker Nicki Cooper		
Secretary Treasurer	John Barker Nicki Cooper		
Data protection approved contact	John Barker Lillian Manning		
Events	John Barker Plus a network of volunteer hub group leaders around our region		
Communications and Newsletters	John Barker Plus contributors from local/annual events etc		
Special Projects (if applicable)	The Regional Development Project (ongoing, and is a paid commissioned role,		

	financed from the annual subvention) provides leadership, executive and admin support to deliver our diverse range of events and activities across our region. NB - current project leader is also the Regional Secretary.		
Additional support			

## Section 2

### *2021 activities and achievements*

Provide a summary of your regional activities over the course of 2021 (this should also include planned activities for the remainder of the year).

Detail quantifiable outputs, key achievements and any relevant commentary.

The details of regional activity for 2021 are shown below; this includes regional hub group activity.

<b><u>2021</u></b>	<b><u>Date</u></b>	<b><u>Event</u></b>
<b>January</b>	14	Regional Forum (digital)
	21 & 29	Regional Digital CPD Event - Resilience, risk and governance theme (1)

<b>February</b>	5	Regional Digital CPD Event Resilience, risk and governance theme (2)
	10	Regional Council Meeting - digital
	19	Surrey Hub Group - digital formation meeting
	23/24	East of England NHS FSD Conference - Digital Workshops (Speed Mentoring)
	25/26	Regional Digital Video releases from January/February recordings
<b>March</b>	8	PF in Wessex Day Conference - postponed as a 2021 live event (digital sessions replaced)
	8/10	Regional Digital Video releases from January/February recordings
	11	Regional Forum (digital)
	12	Regional Digital CPD Event - 2021 Budget & Levelling Up; Analysis and commentary (Ben Zaranko, IFS)
<b>April</b>	20	Regional Webinar - Diversity and Equality (Verna Duncan presentation/discussion forum)
	22	Regional AGM 2021 (digital)
	30	Regional Digital Spring Conference (Half day programme)
	1/30	PF Live - Regional Stand Development (Nick Rochford digital liaison)
<b>May</b>	11	Regional Council Meeting - digital
	13	Regional Forum (digital)
	6	Regional Digital CPD Event - PFI Exit preparation
	4/28	PF Live - Regional Stand development (Nick Rochford digital liaison)
<b>June</b>	11	PF in Kent Day Conference - postponed (to Autumn 2021 or Summer 2022)
	22	Regional Hub Group Meeting - Surrey Hub inaugural meeting (digital)
	28	Regional Digital CPD Event - Workplace Wellbeing:Home & hybrid working - managing stress levels
	1/25	PF Live - Regional Stand Development, then cancellation (Nick Rochford digital) liaison
<b>July</b>	1	Regional Digital CPD Event - Public investment in Place - hosted by Trower&Hamblins
	6	Regional Forum (digital)
	7/8	Public Finance Live - CIPFA Annual Conference - Digital programme
	8	Students Outdoor Networking Evening, Green Park, London
	14	Regional Digital CPD invitation - Y&H hosted:the changing audit landscape
<b>August</b>		No Regional Events planned
<b>September</b>	9	Regional Forum (digital)
	14	Regional Council Meeting

<b>October</b>	26	Regional Digital CPD event - A COP 26 introduction
	28	PF in East Anglia Conference (postponed to Spring 2022)
<b>November</b>	2	Regional Digital CPD Event - Towards Net Zero (2) Delivering, sustaining and forecasting
	5	Annual Pan Accountancy Lunch - Mansion House, London
	10	Students Pub Quiz - Slug and Lettuce, Aldgate, London
	11/12	Annual Regional Forum - hosts North East Region
	19	Annual Regional Dinner and NQM reception/presentation
	26	Regional Digital CPD Event - Workplace Wellbeing: adapting to the 'new normal' workplace
<b>December</b>	6	Regional Council Meeting Live - to be hosted by Grant Thornton at FSQ
	8	Regional Digital CPD event - SR2021 & Levelling Up - the start of a journey?
	(prov)	NQM reception and certificate presentation ceremony - event if needed (or Feb/March 2022)

## Commentary

At our September and December 2020 Council meetings we expected to continue with virtual events only to Easter 2021. We planned to re-instate live events after then - for our hub group meetings, our April 2021 AGM/Spring Conference, student and retired members networks and our popular summer conferences around the region. Obviously, ongoing Covid restrictions prevented that. However, our substituted region-wide virtual events have proved to be very well received as most were recorded for wider on-demand access.

In May 2021, Regional Council again reviewed the Government's Covid 'road map' and agreed to continue supplementing, or substituting, our remaining 2021 planned live events with virtual whole regional sessions as required. That proved to be a sensible plan given the further extension in early June of some Covid restrictions until mid-July 2021. We had prepared publicity for our live events relaunch during July's PF Live! But, resulting from that short notice cancellation, and after assessing the continuing uncertainty around the impact of any residual Covid restrictions, Regional Council decided to continue with themed virtual regional CPD sessions. Firm dates are now programmed throughout autumn and winter 2021/22.

As some live events are (at present, anyway) now possible during November, our students are holding a pub quiz, Regional Council members are attending the Pan Accountancy Lunch and contributing to the live Regional Forum and we

are holding our Annual Regional Dinner on 19 November. Our 6 December Regional Council meeting will be our first live one since January 2020.

Throughout this turbulent year, we have maintained positive relationships with many of our regional members through our virtual programme, our CPD event presenters and event sponsors. Our student network has welcomed (often virtually!) new members to our region. These initiatives will prove to be valuable foundations for the continued growth of membership focused activities all across our region as and while the 'new normal' is becoming established.

### Section 3

#### *Your 12-month plan*

<b>CIPFA Objectives</b>	<b>Branch activities</b>	<b>Measurable Outputs/ KPIs</b>	<b>What will your development funding be used for?</b>	<b>Timescale</b>
<b>Profile raising</b> - policy, networking, employer engagement	<ol style="list-style-type: none"> <li>1. Regular live/virtual full day Conferences and local events (our hub group meetings) across the region, or whole region designed to support and enhance members and students (and guest colleagues) knowledge and to offer networking opportunities.</li> <li>2. Twice yearly mentoring events targeted at specific cohorts and themes to</li> </ol>	<p>Positive feedback from a significant majority of delegates. Maintain hub groups and hosting offers</p> <p>Positive feedback from delegates and sponsors</p>	<p>Mix of hired and hosted venues and digital platform costs.</p> <p>Venue costs, although aim to fully cover mentoring events via sponsorship.</p>	See Plan at Section 5 for our groups - locations and frequencies will be confirmed as the year progresses.

	<p>support our members connect with networks and experienced officers</p> <ol style="list-style-type: none"> <li>3. Presentations to key employer networks (e.g. County/District Finance Heads) on the role of our region and its value to their staff for CPD and related personal development.</li> <li>4. NHS networks engagement via an exhibition stand and delegate attendance at NHS FSD and AHST annual regional conferences and other local events within our region.</li> <li>5. Membership of London Accountants Network, (currently led by ICAEW) which enables reciprocating participation by our regional members and students in a wide range of CCAB/ICMA events, plus occasional joint events on pan-sector topics.</li> <li>6. Annual Regional Dinner, held in London in mid-autumn. It is regularly supported by sponsors engaged in delivery of public services across our region.</li> <li>7. Participation in the annual Pan Accountancy Lunch,</li> </ol>	<p>Positive engagement with regional LA employers and NHS networks for developing topical programmes for our regional events</p> <p>Ongoing involvement (e.g. joint events)</p> <p>Maintain size/quality of event</p> <p>Participation and CIPFA profile raising</p>	<p>Breakeven on a £22k gross spend. Sponsorship is critical to achieve that.</p> <p>CIPFA corporate sponsorship £600 supplemented by</p>	
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	<p>which raises CIPFA's profile regionally and nationally through the CIPFA's Institute President's attendance. We may reduce our contribution to this event as a result of insufficient funds and as we look to prioritise events as a result.</p> <p>8. Contact with key Treasurer Society members to create dialogue on key issues and to publicise our regional events (SCT/ SLT/ ALAT/ HFMA).</p>	Ongoing by individual Regional Council members.	regional budget allocation £120	
<b>Student and Member engagement - Supporting Students, Identifying new members, conversion support</b>	<p>1. Regular whole regional and locally tailored eshots summarising information on forthcoming events.</p> <p>2. Active Regional Student Executive organises social events – annual quiz evening, periodic exam preparation briefings</p> <p>3. Bi-annual presentation events for Newly Qualified members to receive their certificates. These may now be delivered with minimal budget as part of our review if reduced funds are available. We will look to maximise sponsorship opportunities to fund either through cash or use of facilities</p> <p>4. Volunteering opportunities,</p>	<p>Positive reader feedback and event enrolments</p> <p>Growth in student participation in events</p> <p>Take up levels and NQM feedback</p> <p>New volunteers engaged</p>	<p>£1500 – sponsorship is sought where possible e.g. for annual quiz</p> <p>£2000</p>	<p>8/10 per year are arranged</p> <p>Programmed for 2022</p> <p>Programmed for 2022</p> <p>Programmed for</p>



	<p>regionally and locally, are regularly advertised verbally at events and periodically when events take place.</p> <p>5. Bi-annual Retired members Group Meetings – usually an organised visit to a place of interest in our region with a lunch arranged.</p> <p>6. Regional Speed Mentoring scheme as detailed above</p> <p>We will also continue to liaise with our adjacent regions to offer members across our SW and CIM boundaries access to our regional events (e.g. Wessex Conference, Winchester and our East Anglia day conference and related local hub group events. We have also extended invitations to our Wessex Conference to Channel Islands colleagues.</p>	<p>Level of retired member participation</p> <p>Successful mentor/mentee relationships</p> <p>Evidence of successful cross boundary working</p>	<p>Break even on £1k spend</p> <p>Sponsor funded launch in 2017 – each event cost is estimated at £900 if not sponsored.</p>	<p>2022</p> <p>Programmed for 2022</p>
<p><b>Events</b> - local focal point for members and other stakeholders</p>	<p>The 2022 Regional Event Plan (See Section 5) gives details of type of event, with dates and venues status.</p> <p>As already emphasised, we are already, and will continue to incorporate our current Themes into our 2021/22</p>	<p>Evidence in content and conduct of events.</p>	<p>£2000 budget to support new events. Most events are planned to break even on approx. £10k total spend.</p> <p>£9250 to direct and administer the delivery of the events programme and to secure sponsorship through positive</p>	

	<p>rolling Events Plan – which is reviewed and fine-tuned as needed at each Regional Council meeting.</p> <p>We will also support any further consultation proposals for the (originally titled) CIPFA 2020 Project.</p> <p>We initiated our Regional Inclusion and Diversity Project in September 2020.</p>	<p>Continue to offer local workshop venues as requested and invite presentations on the project developments and outcomes in our regional event programmes.</p> <p>Presentations on diversity and inclusion and personal wellbeing in our 2022 events programmes.</p>	<p>relationship management practices.</p> <p>Council approved £500 for initial launch which took place June 2021. Proposal to seek sponsor support for ongoing programme.</p>	
<p><b>Communications</b> - newsletters, website updates</p>	<p>Regular eshots (see above) and our regional website carries event and related information.</p> <p>We continue to develop our use of social media for promoting events and to stimulate commentary and engagement amongst our members (and other interested parties).</p> <p>We successfully initiated digital CPD sessions in 2020. We now plan to offer our future events as a mix of regular digital productions coupled with day/half day live</p>	<p>Regular liaison with marketing team for eshots Evidence of regular and/or growing our regional membership engagement.</p>	<p>Regular eshots (see above), website carries event and related information.</p> <p>Break even as a result of sponsorship, on a turnover of c. £10k</p>	<p>Regular liaison with CIPFA marketing team for eshots.</p>

	events at key venues around our large region- to keep pace with the changing requirements of our members for CPD and live networking.			
<b>Governance</b> - local branch meetings	<p>We programme 4/5 Regional Council Meetings annually, plus our Spring AGM. We have a supportive culture in our Council for new initiatives that are realistic and are likely to be attractive to our regional membership.</p> <p>Attendance at CIPFA Annual Conference and planned Regional Forums.</p> <p>Note - We will maintain our current budget for the CIPFA Conference as we see this as a priority event within the calendar. Dependent on 2022 venue (e.g. if in London), we may need to provide Regional support in terms of a stand and volunteers to help support delegates navigate the conference. Before committing</p>	<p>Quality agendas and effective meetings. Communication of Council business to relevant points in a timely and accurate way. Professional discussion/debate to evaluate new initiatives, with effective risk evaluation where required.</p> <p>Regular and appropriate delegate attendance. Positive participation and engagement in these events</p>	<p>£6000</p> <p>Currently budgeted annually as – £2000 Annual Conference, £1500 Regional Forums</p> <p>NB – An annual provision, which will vary dependent on location and travel/hotel accommodation requirements</p>	<p>We have a supportive culture in our Council for new initiatives that are realistic and are likely to be attractive to our regional membership. Specific Groups and some of our hub groups will hold additional meetings as required.</p>

	to this we would seek discussions with CIPFA to agree how additional costs incurred can be covered without putting additional burden on the Council budget.			
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## Section 4

### *Resources*

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

<b>Resources</b>	<b>Value (£k)</b>	<b>Comments</b>
Opening balance (anticipated for the start of the year)	18	
Core subvention (basics to operate branch)	18	This core funding is essential to sustain delivery of our planned regional activities (assuming a resumption of live events in 2022) The total requirement (ie 2022 bid) is therefore £18,000.
Development funding sought	0	
Income from other activities (e.g. events)	2	
Sponsorship	25	Achieved as an outcome of annual investment in our

		Regional Development Project.
Other resources (e.g. use of meeting rooms)		Sponsor agreements for use of premises for hosting governance and CPD meetings, including refreshments. More recently, our sponsor digital platforms have supported/facilitated our regional governance and CPD meetings. Unquantified but estimated to be in the region of £7k.
Expenditure (related to the activities in Section 3)	50	
Expected closing balance	13	

*Using your earmarked reserves in 2022*

Please provide a brief summary of your branch's earmarked reserves. You should detail how you plan to use these reserves to contribute to your activities in 2022.

<b>Resource</b>	<b>Comments</b>
Earmarked reserves	We do not have any formal ear marked reserves. Within our reserves is approximately £4k that relates to the London Division, an accumulation of small surpluses by this local branch that the CSE Council have agreed should be applied for use exclusively by the branch going forward. The remaining reserves of £14k estimated at the start of 2022, reducing to £9k estimated at the end of 2022 provides a small buffer for managing cash flow of our large events (in particular the Annual Dinner) as well as provision against losses incurred by our events. We aim to breakeven on our events and, generally, this is achieved. However, we have also had years where small deficits on individual events have been made where costs have increased, or sponsorship has not fully

materialised. Over the last 10 years we have deliberately and gradually run down our reserves in a measured way by setting small deficit budgets. We now believe we are reaching the minimal viable reserves to enable us to run the large, high profile events that we do whilst holding the financial risk associated with these events.

## Section 5

### *Calendar of activities – THIS WILL BE KEPT UNDER REVIEW AS THE COVID SITUATION DEVELOPS*

Events are planned as a mix of live and digital for 2022 and include our Regional Hub Groups. However, recent COVID news suggests there may not be a smooth delivery of our 2022 plans. It should be emphasised that support work is still required to deliver any substitute virtual events and (usually) an approximate 3-month timescale to organise large live day conferences.

Hub groups may need a shorter lead time but could require additional support from John Barker Consulting Ltd (JBCL) due to local dormancy. Live events are usually break even because of venue hosting or sponsorship. Maintaining our sponsor and presenter relationships throughout the pandemic should prove to have been a good investment to support a resumption of live events during 2022.

Our London Division is expected to resume its quasi-autonomous status during 2022.

<b>Month</b>	<b>Activity</b> (include dates and locations where appropriate)
January	20 Regional Digital CPD Event
February	2 Regional Council Meeting 15 Regional Digital CPD Event

	<p>22/23 East of England NHS FSD Conference (Newmarket)</p> <p>tbc East Anglia Day Conference</p>
March	<p>tbc Wessex Day Conference (hosted by Hampshire CC, Winchester)</p> <p>16 Regional Digital CPD Event</p> <p>tbc Regional Hub Groups</p>
April	<p>tbc Retired Members' Group Meeting - Clerkenwell Priory (postponed from 2020)</p> <p>w/c 25 Regional AGM and Spring Conference (London)</p> <p>tbc Regional Digital CPD Event</p> <p>tbc Regional Hub Group Meetings</p> <p>tbc Thames Valley Day Conference (Reading University)</p>
May	<p>10 (prov) Regional Council</p> <p>tbc Regional Digital CPD Event</p> <p>tbc Regional Digital CPD Event</p> <p>tbc Regional Hub Group Meetings</p>
June	<p>tbc Kent Day Conference (or September)</p> <p>tbc Regional Digital CPD Event</p> <p>tbc Regional Hub Group Meetings</p>
July	<p>tbc Public Finance Live - CIPFA Annual Conference - venue tbc</p> <p>12 (prov) Regional Council (digital)</p> <p>tbc Regional Hub Group Meetings</p>
August	No Regional Events planned
September	<p>tbc PF in Kent Day Conference (or June)</p> <p>tbc Regional Council Meeting</p>

	tbc Regional Digital CPD event tbc Regional Hub Group Meetings
October	tbc Regional Digital CPD event tbc Annual Pan Accountancy Lunch - London tbc Regional Hub Group Meetings
November	tbc Annual Regional Dinner tbc Annual Regional Forum tbc Regional Digital CPD event tbc Regional Hub Group Meetings
December	tbc Regional Council Meeting tbc Regional Digital CPD event tbc Regional Hub Group Meetings

**Our Regional Hub Groups:**

London Division

Wessex

Thames Valley

Cambridge

Suffolk

Norfolk

Essex

Kent

West Sussex



East Sussex  
Hertfordshire  
Surrey

Please submit your plan to [Heather.Reeves@cipfa.org](mailto:Heather.Reeves@cipfa.org)