

Regional Development Plan 2024

Region: South East

Section 1 - Contacts

Details of board/committee members and their role within the branch, and any particular projects they have responsibility for.

Position	Name	Email	Telephone Number
President	John Barker		
Vice President	Nicki Cooper		
Junior Vice President	Tom England		
Immediate Past President	Kathryn Long		
Secretary	Cath Edwards		
Treasurer	Nicki Cooper		
Data contact	John Barker Lillian Manning		
Events	John Barker Plus - a network of volunteer hub group leaders around our region		
Communications and our Regional Newsletter	Tom England (JVP) assisted by Thu Ta with		

	contributors from local/annual events etc		
Special Projects (if applicable)	<p>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 President.</p> <p>Regional Council has established a Succession Planning Working Group to identify arrangements for delivery of our Regional Events Plan from 2024 onwards, when John Barker steps down from the current Project Role and we establish a paid Major Events and Sponsorship Lead role.</p>	<p>Further contact info can be provided for individual events and activities if required.</p> <p>NB. A potential paid support successor for JB as a Major Events and Sponsorship Lead role is now identified. Regional Council is in discussion with him to identify the future scope of the role and the fee required to deliver it.</p> <p>Successor hand over is expected to start early in 2024 and will most likely require a tapering in/out to achieve a smooth transfer of the range of responsibilities.</p>	
Any additional roles	At our December 2023 Council Meeting we		

	plan to review our current volunteer roles to identify any changes required.		
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Section 2 - 2023 activities and achievements

Provide a summary of your regional activities over the course of 2023 (this should also include planned activities for the remainder of the year).

Detail quantifiable outputs, key achievements and any relevant commentary.

The details of, with some commentary on, our regional activity for 2023 are shown below; this includes our relaunched London Division, our regional hub group meetings and our Regional Student Network.

Commentary

Our 2023 Development Plan was prepared on the assumption that we would return to live CPD events wherever possible, supplemented by our sponsored Zoom whole-region webinars. Our 2023 AGM in April emphasised that intention. Accordingly, we have programmed live events at venues across our region. We had deferred two events planned for September 2022 to respect the period of National Mourning and they both took place during February 2023.

Our events programme has also been mindful of new patterns of working adopted by many organisations within our region. Offering live events has been a welcome opportunity for many of our regional members to re-establish face to face contacts outside of their immediate workplace networks. Employers have recognised this and have encouraged support, especially through local hosting offers and positive promotion to their staff. Wherever possible, our event programmes are designed to offer adequate time for networking and also are mindful that not all participants work full time, so may not be able to attend for a whole day event (eg due to childcare requirements) so part-day events have proved to be popular, especially for some of our hub group meetings. However in 2023 (and for the future) we intend to retain several full day conferences in each part of our large region – these are sponsored events and are valued client relationship opportunities by our sponsors, particularly those who sponsor our Annual Regional Dinner.

During PF Live 2023 at QE11 Conference Centre in June, CIPFA South East Council members hosted the Regional Stand. It was a well located popular meeting and social point. As ever, there were opportunities to share ideas with colleagues from several other regions and greet some of the PF Live exhibitors, who we hope, will be interested in sponsoring or presenting at future regional events across the nation.

The Autumn Regional Forum, organised jointly with CIPFA South West colleagues in Bournemouth on 18/19 October, attracted delegates from most UK Regions and was also a great opportunity to meet the Chester based Regional Team in person. We had a topical agenda and our CIPFA HQ colleagues' presentations encouraged some good delegate participation. For the Forum Dinner we welcomed two ICAEW colleagues and laid some valuable foundations for putting the 'Closer Collaboration' protocols into practice for 2024 across the South East and South West Regions. Hopefully, as there was no Pan Accountancy Lunch this year, the dialogue during the Forum Dinner will compensate for its absence.

Our Regional Student Executive has organised networking evenings and a pub quiz to encourage live participation - many students have had limited peer contact during their academic sessions, so these were very popular! Unfortunately, our Retired Members were not able to meet as planned this October. Our long serving group lead has experienced health problems this year we are now seeking a replacement to develop a 2024 programme.

Our diaried governance meetings have continued as a mix of live (for preference), but usually with a hybrid facility. We again held additional virtual Council meetings this year as we resumed pre-Covid levels of regional activity. This has enabled more consistent participation by key Council members, who welcomed the inclusive option to contribute. Our future meetings are to be planned to reflect hybrid working protocols now adopted in many organisations across our region.

Two key ceremonial events took place in November. Our Annual Dinner on 3 November was again well supported by valued sponsors and we welcomed 225 enthusiastic guests. Prior to the Dinner we held an invitation reception and certificate presentation ceremony for 15 newly qualified members admitted during 2022 and their guests. Certificates were presented by Sir Tony Redmond, a Past Institute President and a long-standing member of our Region.

We have continued to develop positive relationships with local ICAEW members in their London Accountants Group and the South Coast Joint Professions Network. Several invitations to professional networking events have been received – and those occasions will facilitate links with colleagues from financial or other chartered bodies from private and public sector organisations, and especially to advance the intentions of the 'Closer Collaboration' with ICAEW.

CIPFA South East Region - REGIONAL EVENTS PLAN 2023 (V15) updated to 31 October 2023

2023

January

19 Essex Hub Group Meeting (County Hall, Chelmsford)

February

1 Regional Council Meeting (virtual)
21 Surrey Hub Group Meeting (hosted at Woodhatch, Reigate)
27 Wessex Day Conference (hosted by Hampshire CC at Winchester)
tbc Regional Digital CPD Session

March

14 Thames Valley Hub Group Meeting (County Hall, Oxford)
21 Regional Council Meeting (Hybrid, hosted by TechnologyOne)

April

27 Regional AGM/Spring Conference (held at Grant Thornton, FSQ, London)
Hub Group Meeting(s)

May

10 Regional Council Meeting (Hybrid, hosted by Surrey CC, Reigate).

June

12 East Sussex Hub group (Civic Centre, Uckfield)
13 London Division - Evening Seminar (hosted by Grant Thornton, FSQ)
27/28 PF Live, London (CSE Host Region)

July

4 South Anglia Day Conference (St Albans, Hertfordshire)
11 Regional Council (Hybrid from Woodhatch Place, Reigate Surrey CC HQ)
17 Essex Hub Group Meeting (Essex CC, County Hall, Chelmsford)

August

No events planned

September

21 Regional Council Meeting (Hybrid from Woodhatch Place, Reigate (Surrey CC HQ)
19 Hub Group Meeting - Wessex planning meeting (s)
18/26 Regional Digital CPD Session - lforG podcasts
tbc Mentoring Event (GT host offer) - now early 2024

October 18/19 Annual Regional Forum (Joint CSE/CSW, Queens Hotel, Bournemouth)
 13 Annual CSE-SN Pub Quiz, Aldgate, London
 16 London Division Autumn Seminar
 various Regional Digital CPD Sessions - T&H/lforG/GT

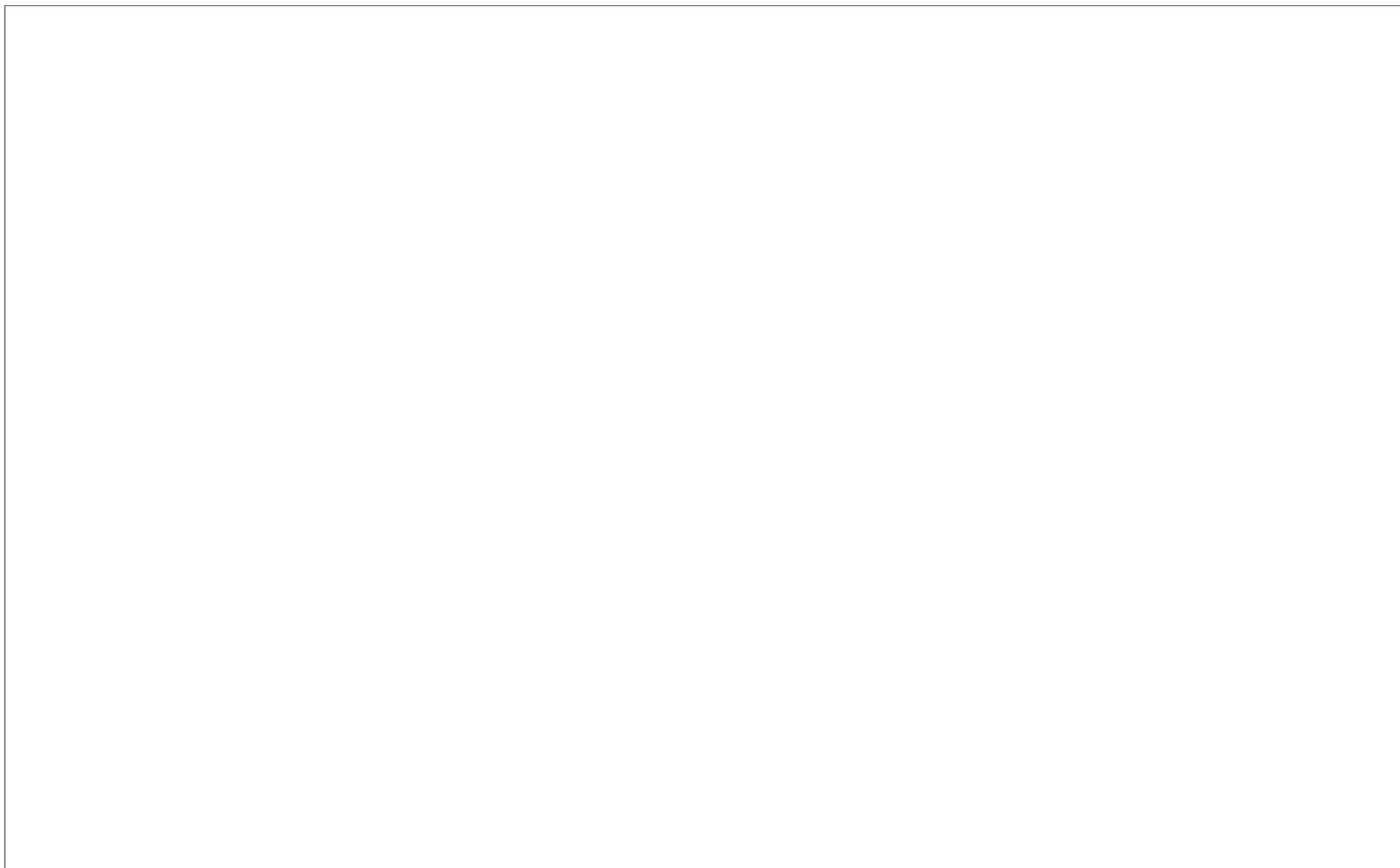
November 3 Annual Regional Dinner, InterContinental Hotel, Park Lane, London
 3 NQM Certificate Presentations (at pre-Dinner invitation reception)
 17 West Sussex Hub Group Meeting (County Hall North, Horsham)
 w/c 27 North Anglia Day Conference (Norwich) (or early December)

December 6 Regional Council Meeting (TechnologyOne at Paddington hosting)
 8 Hub Group Meeting - Norfolk (host Norwich City Council)
 tbc Regional Digital CPD Session

Our Regional Hub Groups

London Division
Wessex
Thames Valley
Cambridgeshire
Suffolk
Norfolk

Essex
Kent
West Sussex
East Sussex
Hertfordshire
Surrey



Section 3 - Your 12-month plan

Council

CIPFA Objectives	Branch activities	Measurable Outputs/ KPIs	Timescale
<p>Profile raising - policy, networking, employer engagement</p>	<ol style="list-style-type: none"> 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. 2. Twice yearly mentoring events targeted at specific cohorts and themes to support our members connect with networks and experienced officers. 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. 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. 5. Membership of London Accountants Network, and South Coast Joint Professional 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. 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. 7. Participation in the 2024 Pan Accountancy Lunch, (if reinstated) which raises CIPFA's profile regionally and nationally through the CIPFA's Institute President's 	<ol style="list-style-type: none"> 1. Positive feedback from a significant majority of delegates. Maintain hub groups and hosting offers 2. Positive feedback from delegates and sponsors 3. & 4. Positive engagement with regional LA employers and NHS networks for developing topical programmes for our regional events Participation in the January 2024 HFMA SDN Student Conference 5. Ongoing involvement (e.g. joint events with ICAEW local societies in our region) 6. Maintain size/quality of event 7. Participation and CIPFA profile raising 	<p>See Plan at Section 6 for our groups – Planned event locations and frequencies will be confirmed as the year progresses.</p> <p>We review and update our Event Plan at every Council Meeting.</p>

	<p>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>	8. Ongoing by individual Regional Council members.	
<p>Student and Member engagement - Supporting Students, Identifying new members, conversion support</p>	<ol style="list-style-type: none"> 1. Regular whole regional and locally tailored e-shots summarising information on forthcoming events. 2. Active Regional Student Executive organises social events – annual quiz evening, periodic exam preparation briefings 3. Presentation events for Newly Qualified members to receive their certificates, subject to numbers and interest. We will continue to seek to attract sponsorship to combine an invitation certificate presentation reception with our Annual Dinner 4. Volunteering opportunities, regionally and locally, are regularly advertised verbally at events and periodically when events take place. 5. We plan to re-instate bi-annual Retired Members Group Meetings – usually an organised visit to a place of interest in our region with a lunch arranged. 6. Regional Speed Mentoring scheme as detailed above <p>We will also continue to liaise with our adjacent regions to offer members across our South West and Midlands boundaries access to our major regional events (e.g. Wessex Conference, Winchester and our East Anglian Day Conference) and related local hub group events. We have also extended invitations to our Wessex Conference to Channel Islands colleagues.</p>	<ol style="list-style-type: none"> 1. Positive reader feedback and event enrolments 2. Growth in student participation in events 3. Take up levels and encourage NQM feedback 4. New volunteers engaged 5. Level of retired member participation 6. Successful mentor/mentee relationships <p>Evidence of successful cross boundary working</p>	5/6 in 2023 planned.
<p>Events - local focal point for members and other stakeholders</p>	<p>The 2024 Regional Event Plan (See Section 6) 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 Topical Themes into our</p>	Evidence in content and conduct of events.	

	<p>2023/24 rolling Events Plan – which is reviewed and fine-tuned as needed at each Regional Council meeting.</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 will be introduced into our 2024 events programmes.</p>	
<p>Communications - newsletters, website updates</p>	<p>Regular e-shots (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). This will be developed further in 2024 following from the introduction of a Communications Officer post in 2023, who now initiates social media event publicity for the South East region.</p> <p>We first initiated digital CPD sessions in 2020, as an early response to Covid restrictions. Since then, we have planned to continue to offer our future events as a mix of periodic digital productions coupled with day/half day live events at key venues around our large region- to keep pace with the changing requirements of our members for CPD and live networking. As hybrid working is now well established in many organisations across our region we see this as an inclusive and practical initiative.</p>	<p>We are developing regular liaison with CIPFA Regions Team for regional e-shots and regional newsletters. Evidence of regular and/or growing our regional membership engagement.</p>	<p>Regular liaison with CIPFA Regions Team for e-shots.</p> <p>We have now designated a senior Council member as Communications Lead, assisted by a Communications Officer to lead on and co-ordinate all aspects of communication techniques</p>
<p>Governance - local branch meetings</p>	<p>We programme 4/5 Regional Council Meetings annually, plus our Spring AGM.</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.</p>	<p>Quality agendas and effective meetings. Communication of Council business to relevant points in a timely and accurate way.</p> <p>Professional discussion/debate to evaluate new initiatives, with</p>	<p>Specific Groups and some of our hub groups will hold additional meetings as required.</p>

	<p>Attendance at CIPFA Annual Conference and planned Regional Forums.</p> <p>Note - We would like to maintain our current budget for the Annual CIPFA Conference PF Live and the Annual Regional Forum - as we see these as priority events within the calendar.</p>	<p>effective risk evaluation where required.</p> <p>Regular and appropriate delegate attendance.</p> <p>Positive participation and engagement in these events</p>	
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Section 4 – Development Funding

Please state the amount of additional funding required on top of the initial £2,000 and how this will be utilised.

Requested Amount	£24,556
Use of Funding (Please outline how you will use the additional funding and a breakdown of costs)	<p>We are requesting development funding of £24,556 as a contribution to our total running costs of approximately £64,000. We anticipate securing approximately £29,000 of sponsorship and fee income and will fund £8,500 from our reserves.</p> <p>The £24,556 funding comprises:</p> <ul style="list-style-type: none">• £19,830 to deliver our events programme and secure sponsorship, including venue hire, catering, speakers and paid support. These events include:<ul style="list-style-type: none">○ Regular face to face and virtual conferences as well as local CPD and networking events across the region.○ Mentoring events,○ Our Annual Dinner○ Spring Conference○ Retired Members events• £130 for participation in the Annual Pan Accountancy lunch (CIPFA corporate sponsorship of £600) if re-instated in 2024• £2,436 To support the South East CIPFA Student Network, including events (net of sponsorship), running costs and support students to attend conferences.• £2,160 for presentation events for Newly Qualified members.

Section 5 – Resources

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

Resources	Value (£k)	Comments
Opening balance (anticipated for the start of the year)	19	
Core subvention (basics to operate branch)	2	
Development funding sought	25	This funding is essential to deliver our regional events to members We secure significant sponsorship which funds approximately 50% of our programme and we are seeking to increase this slightly in 2024.
Income from other activities (e.g. events)	2	
Sponsorship	27	
Other resources (e.g. use of meeting rooms)	unknown	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 £7-10k.
Expenditure (related to the activities in Section 3)	64	

Expected closing balance	11	
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Using your earmarked reserves in 2023

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 2023.

Resource	Comments
Earmarked reserves	<p>We do not have any formal earmarked reserves. Within our reserves is approximately £3.5k 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 £15.5k estimated at the start of 2024, reducing to £11k estimated at the end of 2024 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.</p> <p>For 2024 we propose to use £8,500 of reserves to fund items that CIPFA explicitly declined to fund through development funding in 2023:</p> <ul style="list-style-type: none"> • £1,500 for CSE Council members to attend Regional Forum • £2,000 for CSE Council members to attend PF Live • £5,000 for handover costs for our Events and Sponsorship Lead from John Barker to his successor.

Section 6 – Calendar of activities

Events are planned as a mix of face to face and virtual for 2024 and include our London Division and Regional Hub Groups. Support work is required to deliver 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 senior Regional Council members due to local dormancy. Live events are usually planned to break even because of venue hosting or sponsorship. Our Regional Student Executive will be developing their detailed academic and social activity plan in early 2024 and will continue to engage positively with our mainstream events too.

Our London Division is expected to resume its quasi-autonomous status fully during 2024, with an initial half day seminar planned for 30 January, plus 2/3 events later in the year.

We expect to re-instate our bi-annual Retired members Group during 2024

We plan to participate whenever possible in the regular Regional Drop In virtual sessions throughout the year.

Month in 2024	Activity (include dates and locations where appropriate)	
January	w/c 16	Mentoring Evening (a London host venue tbc)
	30	London Division Seminar- The Green Finance Agenda (to be hosted by Deloitte LLP)
	tbc	Regional Digital CPD session
February	1	Regional Council Meeting
	w/c 19	Surrey Hub Group Meeting (to be hosted at Surrey CC, Woodhatch Place, Reigate)
	26	Wessex Day Conference (to be hosted by Hampshire CC at Winchester)

March	tbc	Hub Group Meeting(s)
	tbc	Regional Digital CPD Session
April	w/c 15	Regional AGM/Spring Conference (to be hosted by Grant Thornton UK LLP, London)
	tbc	Hub Group Meeting(s)
	tbc	Regional Digital CPD Session
	tbc	Retired Members Group meeting
May	8	Regional Council Meeting
	tbc	Newly Qualified Members' Ceremony
	tbc	North Anglia Day Conference (or June)
	tbc	Hub Group Meeting(s)
	tbc	Thames Valley Day Conference (or Autumn 2024)
June	tbc	North Anglia Day Conference (or May)
	tbc	London Division Seminar
	tbc	Hub Group Meeting(s)
	tbc	Regional Digital CPD Session
July	10/11	PF Live, Manchester (CIPFA NW Host Region)
	tbc	Hub Group Meeting(s)
August		No events planned
September	19	Regional Council Meeting
	tbc	Kent Day Conference
	tbc	Hub Group Meeting(s)
	tbc	Regional Digital CPD Session

October	tbc	South Anglia Day Conference
	tbc	Hub Group Meeting(s)
	tbc	Annual Regional Forum – CIPFA in the Midlands hosting
	tbc	Retired Members' Group Meeting
November	Tbc 15	Annual Regional Dinner
	tbc	Annual Pan Accountancy Lunch
	tbc	Hub Group Meetings
December	4	Regional Council Meeting
	tbc	Hub Group Meeting(s)
	tbc	Regional Digital CPD Session

Our Regional Hub Groups:

London Division

Wessex

Thames Valley

Cambridge

Suffolk

Norfolk

Essex

Kent

West Sussex

East Sussex

Hertfordshire

Surrey