



CIPFA
SOUTH EAST REGION

ANNUAL REPORT

Introduction

I am now coming to the end of my two year tenure as Chairman of CIPFA South East (CSE), which of course was preceded by one year as Vice Chairman. I will be stepping down in March at our AGM, but will reflect with some pride on many of the things that we have achieved during that time. It does feel to me that we are starting to make a difference and I hope that you feel this too.

This year the CSE Council has again worked hard this year to build on and embed our successes from last year under the 'Revitalising the Region' banner. However, this has been more of a year of consolidation than great leaps forward. To this end the local area groups that started last year have continued to meet and are generally well supported, and we have continued with the receptions for the newly qualified which seem to have been successful and much appreciated by those attending.

The Annual Dinner was also a great success this year, continuing with last year's new venue of the Renaissance Chancery Court Hotel and including after dinner dancing to a live band. Many of the guests commented on the quality of both the food and the venue, but not necessarily the after dinner speaking!

Of course this year was the 50th Anniversary of the annual CSE Summer Conference in Reading, which once more was an excellent event with the bar being raised yet again when it came to the quality of the speakers and presentations. As it was the 50th we introduced some new features this year which included a Pimms reception on the Thursday evening, a Black Tie dinner, an excellent live band and this year we adopted a charity for the conference – the British Paralympic Association, and we were honoured to have the paralympian Giles Long MBE give the after dinner speech. The speakers included the return of Kate Hull-Rogers telling us how to flirt through work, an excellent session on leadership from Catherine Doherty as demonstrated by Ernest Shackleton during his ill-fated polar expedition, a fascinating session on the Millennium Dome from Lord James of Blackheath (and what this might mean for the 2012 Olympics) and a superb double act from Southwark's Annie Shepherd and Duncan Whitfield.

There were also some presentations that reflected on how things have changed over 50 years of running these events, which included Phil Triggs giving a potted history of the event and Bill Roots (ex of Westminster CC) musing on the changes that the public sector (and public sector finance in particular) have seen. As a long standing delegate myself I did find both sessions to be quite moving!

Other long standing functions also continued this year, including the annual CSE quiz (this year not won by the London Borough of Redbridge for once!) and our retired

members group continued to keep active with events, including a trip around the stadium at Twickenham.

We have also introduced some new functions into our work programme. For example we have been speaking to most of the other Accountancy Institutes and will shortly be running some joint events, which we hope will appeal to members from whichever Institute they may belong to.

Our other new innovation has been the introduction of some free seminars, through an arrangement negotiated with IPF, which we have been trialling in the London area. These have covered topics such as Project Management, Change Management and the introduction of the CIPFA/SOLACE new Governance Framework. The speakers at these events are generally available for local area groups to invite, so if you would like to see a session more local to you on these or other subjects (and you are willing to arrange a venue) then please don't hesitate to give me a call.

However, we have not been successful in all of our endeavours. Last year I did say that we were planning to trial run with some paid support and this has not yet come to fruition. The subject has been discussed at Institute Council, but no agreement to try this out has yet been secured. Clearly one of the jobs for the new Chairman will be to try and follow this through and run the trial as originally planned!

Hopefully you will see that we continue to think of new ways to engage with South East members and that the range of services available to you locally are increasing. However this is all done with volunteer effort from a number of dedicated people on CSE Council and we could achieve so much more with your help and support – in particular if you think you could organise and run a local event we would be very pleased to hear from you.

In March I have the honour of passing over the reins to my Vice Chairman, Alison Sweeting. I am confident that she will continue to move CSE forward, although doubtless with more style and panache than I! I am pleased that I can hand over the position who is keen to make a difference, but I plan to be around for a year or two yet on CSE Council as a past Chairman, so I will be able to keep an eye on her and (if necessary) act as a brake on any wild excesses.

SOUTH EAST REGION DEVELOPMENT PLANS 2007

Quartile 1 – Educating, Training and Continuously Developing Outstanding Members

Key Activity	Performance Indicator(s)	Actual
Produce CSE newsletter in paper and electronic formats	Develop and publish newsletter in January (last paper version) and go over to e-newsletter.	Achieved
Sustain the involvement of retired members	Hold 2 meetings per year for retired members maintaining current attendance levels. Maintain the retired members mailing list at current levels	<i>Achieved</i>
Implement product development action plans and monitor impact	Based on product development strategy ensure products are developed and available to Divisions. Work with Communications and Members Development Groups to ensure their dissemination. Target dates to be defined in Product Development Strategy. Asses impact and value of products to the Divisions based on their feedbacks and refine approach as appropriate	Not achieved
Support Action Learning Sets	Define Action Learning product set and promote to Divisions. Consider developing action learning “matching” service.	Still work in progress
Develop mentoring scheme	Define mentoring scheme and promote to Divisions. Consider development mentor “matching” service.	Achieved
Implement student engagement action plans and monitor impact	Based on overall student engagement strategy undertake activities to facilitate the more active involvement of students and newly qualified within the CSE Region. Target dates to be as defined in the engagement strategy. Asses impact of student engagement programme and refine approach as appropriate	Not Achieved
Hold regional student event	Hold at least 1 student event per annum, with 10% of students in region attending.	Not Achieved
Sponsor students to attend NSF conference	At least one student to attend NSF conference	Achieved
Sponsor students to attend CIPFA or ACIPFAL conference	Sponsor coach for at least 30 students. Conference to be determined by location.	Coach provided but only 8 students took up the offer
CETC and ARU briefings	Co-ordinate delivery of annual briefings, at least 80 % attendance of first year students.	Achieved
Develop and implement student mentoring scheme	Increase take up of student mentoring scheme. Achieve 90% satisfaction levels with scheme.	Not Achieved
Deliver student team building event	Deliver event and secure at least 25 students attending.	Not Achieved
Undergraduate Prize	Prize awarded and publicity obtained	Achieved
Annual regional dinner	An annual dinner is delivered each year with around 200 attending.	Achieved
Establish a graduation ceremony for newly qualified	Ceremony run each year with at least 70% of those invited attending. First ceremony 2006.	Achieved
Summer Conference	An annual conference is organised at least maintaining attendance at prior years level.	Achieved
AGM and Support event	The AGM and a supporting seminar is delivered each year, at least maintaining attendance at prior years level.	Achieved
Actively participate in the CIPFA	Sponsor attendance at the conferences. Ensure	<i>Achieved</i>

and Conference for the Regions	at least 3 representatives attend each conference.	
Promote involvement in CPD	Full participation of members for phase 1, 2 and 3.	Achieved
Employer engagement programme	Define and implement a programme to make contact with key employer groups in order to secure their support to the revitalising vision. At least 5 groups to be contacted.	Achieved
Establish links with local treasurers' groups and other relevant bodies	Attend at least 5 meetings with employers groups.	Achieved
Partner engagement programme and monitor impact	Define and implement a programme to make contact with potential partners or current competitors in order to work with them to secure revitalising vision. At least 4 partners to be contacted. Assess impact of engagement programme and refine approach as appropriate.	Achieved
Promote links with accountancy and other relevant bodies in the region	Develop at least 2 events with key partners.	Achieved
Engagement with Divisions and monitor impact	Make contact with 3 divisions. Ascertain their support and needs and facilitate their development.	Achieved
Re-establish the Divisions and monitor impact	Facilitate the re-establishment of at least 3 Divisions. Assess impact of work with the Divisions and refine approach as appropriate.	Almost achieved, 2 re-established and 3 rd is in progress but first meeting had to be cancelled at short notice.
Support and develop the delivery of local events to meet the needs of members and students.	Increase the numbers of Members and students participating in local activities. Support the Divisions in delivering these events. Ensure each active Division delivers at least 1 event per year.	Achieved
Quiz Evening	Event supported by a minimum of 50 members	Achieved

2 Meeting Customer Needs and Expectations

CSE does not currently run any activities primarily to raise funds. Members and student focussed activities are listed under quartile 1.

3 Setting High Standards and Delivering Best Practice in the Public Interest

CSE does not currently carry out research or policy and technical work. Individual members contribute to the work of CIPFA via boards, committees and panels and through requests to contribute to consultations.

4 Developing Our People and Making Best Use of our Resources

Key Activity	Performance Indicator(s)	Actual
Keeping Active	All Members of CSE Council to attend at least two thirds of	Achieved

(moved from Q1 but see also regional health indicators)	Council meetings. Performance to be measured each year following the AGM.	
<i>Volunteers</i> (moved from Q1 but see regional health indicators)	Recruit volunteers to support CSE Council and development groups to deliver this development plan	Achieved
Implement strategy and monitor impact	Against clear milestones set out in the strategy ensure activities and targets are achieved. Dates dependant on those set out in the strategy Assess impact of strategy activities and refine strategy as appropriate. Dates dependant on those set out in the strategy	Not Achieved
Develop the use of web-based communications	Increase CSE web-site hit-rate by 10% per annum year on year	Achieved
Keep web-site up to date	Information up-dated and or deleted within 2 weeks	Achieved
Increase use of e-mail contact with members	Increase % of e-mail addresses held. Increase number of times e-mail used to communicate	Achieved
Produce budget and accounts	Budget by 1 st January each year and accounts by 28 th February each year, audited accounts by the date of the AGM. VAT returns achieved quarterly.	Achieved
Administrative activities	Ensure administrative activities are carried out effectively: Reports, plans and budgets to BfR in required timescales;	Achieved
Promote opportunities to potential sponsors and increase secure increased sponsorship	Agree target and work with Institute to secure greater range of sponsorship as a part of national initiative	Achieved

SOUTH EAST REGION ACTIVITY LEVEL 2007

Date	Event	Numbers Attending
01.03.07	Researching Management Systems	30
14.03.07	Annual Conference -	61
14.03.07	Annual General Meeting	56
14.03.07	Graduation Ceremony	56
04.04.07	Retired Members -The Royal London Hospital	22
06.06.07	Graduation Ceremony - Robert Street	35
30.06.07	Students attending ACIPFAL conference	8
03.09.07	Project Management Seminar - Robert Street	36
20 to 22 09.07	Summer Conference - Reading University	80
09.10.07	Quiz Evening	44
18.10.07	Project Management Seminar - Robert Street	40
19.10.06	Retired Members - Trip to Twickenham Rugby Stadium	16
23.10.07	New Corporate Governance Seminar - Robert Street	26

02.11.07	Annual Dinner - Renaissance Chancery Court	194
15.11.07	Graduation Ceremony - Robert Street	21
13.12.07	Seminar - What's your Perspective - Robert Street	36
	Sub Divisions	
	East Anglia	
04.07.07	Shared Service Centres	52
	Essex	
22.01.07	New SORP	85
24.05.07	Project Management	51
	London Division	
19.07.07	Quiz evening	63
10.10.07	Seminar Transformational Government	70
	Home Counties Group	
21.01.07	General Meeting	6
23.03.07	General Meeting	5
18.05.07	General Meeting	9
21.09.07	General Meeting	8
16.11.07	General Meeting	7
	Wessex	
30.10.07	Comprehensive Spending Review	32
	CPD Sessions	
27.03.07	Information for members due to register this year	8
25.04.07	Information for members due to register this year	12
20.06.07	Information for members due to register this year	12
02.10.07	Information for members due to register this year	4
Total		1185
	South East Region Total Membership	4976
	Activity Level	4.1991561

Chairman's personal comments

The progress that has been made and consolidated this year has only been possible through the efforts and dedication of the volunteers that sit on CIPFA Council. It is very much a team effort with everyone playing a part, but there are those who go above and beyond the efforts of those others. It is therefore only right that I pay tribute to their efforts in particular. Firstly, many thanks to Mike McManus (CSE Council Secretary) for his hard work in trying to keep the Council (and me in particular) in order – and for putting up with me constantly missing his deadlines. Secondly to John Hilsden, Events Secretary, who has worked extremely hard this year at arranging our AGM, the annual dinner and the graduation ceremonies. A lot of work has fallen on John's shoulders this year but he has risen to the task manfully.

A lot of work has also fallen on the shoulders of our Development Group Chairpersons: so again many thanks to Laura Brackwell, Sam Foley, and Christina Earls for their efforts and enthusiasm in trying to drive the region forward. Finally particular thanks for her support to Alison Sweeting who, not only almost single

handed organises the Summer School, has also done excellent work as my Vice Chair. I am sure that she will be a great success as Chair of the Region next year!

Steve Watson
Chairman