



**SOUTH WALES & WEST OF ENGLAND REGION**

**ANNUAL REPORT 2007**

## **Presidents Report**

This will be my third and final year as President of the Region and with a little sadness and slight reluctance hand over the reins to Mike Ellingford, who I know will make an excellent President and take the Region forward. I have to confess three years as President has been a most enjoyable experience but makes it harder to come up with new ideas each year from a different perspective and keep the regional team enthused. However I have been fortunate to have been surrounded by a vibrant and enthusiastic team who have supported me over the term of office and I thank them all deeply for this.

The year has again been very successful for the Region against a background of increasing work pressures on all volunteers and as will be seen from the following pages we have achieved a significant number of the goals that we as the Regional Committee had set ourselves.

These achievements do not come lightly to a small team and are down to the hard work of the dedicated group of volunteers. The results of our success have started to encourage more members to become involved and to increase attendance at training sessions and seminars. It is our hope and intention to build on this success and to continue the growth through 2008 and beyond.

The student section goes from strength to strength as does the Bristol sub-group, the ever popular Audit Group and also the South Wales retired members group. I must now look to start a South West retired members group!

CIPFA members have as ever been actively engaged with CIPFA Council, the Board for the Regions and I will still sit as link members between the National Student Forum and the Board for the Regions, along with being elected as Regional representative on CIPFA Council.

The Regional Council has developed a strategic plan for the period to 2010 and this will form the basis of the annual development plan for 2008 which is available on the website.

In September 2008 the Conference for the Regions comes to the South West and will be held in Plymouth from the 17<sup>th</sup> to 19<sup>th</sup> September. I have been asked and readily accepted the task of coordinating the conference so will not be escaping just yet.

I would like to thank all members of the Regional Council for their hard work and dedication over the last and previous years and look forward to working with the new President and his team over the coming years as the Regions ambitious new plans develop.

Stephen J K Purser  
Regional President

<b>Aim</b>	<b>Objective</b>	<b>Activity</b>	<b>Responsibility</b>	<b>2007</b>	<b>2007 Outcome</b>	
1 To support and develop CIPFA members and the organisations in which they work.	1a To maintain an understanding of the development needs of members and newly qualified members.	Undertake on an annual basis a survey of the development needs of members and use this to inform the development of regional events and other activities.	Regional President	Undertake a survey of the development needs of members and use this to inform the development of regional events and other activities.	A number of surveys have been carried out by CIPFA Central and the results are being used by the Region.	
		Establish a facility on the regional website for members to propose ideas for events and other development opportunities.	Regional President	Establish a facility on the regional website for members to propose ideas for events and other development opportunities.		This has been completed.
		Provide attendees at regional events and other activities with the opportunity to suggest ideas for future events and activities.	Regional President	For each event or other activity organised, ensure that all participants have the opportunity to propose ideas for further events or activities.		A feedback form is provided at every event although not all suggestions have been actioned in respect of future event planning.
	1b To organise and promote development opportunities for members, newly qualified members and retired members across the region.	Organise at least four pan-regional events each year, open to and designed to appeal to members, newly qualified members and retired members.	Regional Council	Organise at least one pan-regional event, open to and designed to appeal to members, newly qualified members and retired members.	The Region in 2007 provided 19 events at which 575 people attended. This number includes the Annual Seminar and AGM, Audit and other training spread over the whole region. See detail of numbers above.	
		Organise at least four events in each established sub-regional centre each year, open to and designed to appeal to members within that sub-region.	Sub-Regional Leads	Organise at least two events in each established sub-regional centre, open to and designed to appeal to members within that sub-region.		

		Identify other relevant events and opportunities that may be of interest to members and promote them via the regional website and through other communications as appropriate.		Target activity for 2008 and on.	A number of requests have come in over the year which have been put on the website although no detailed record has been kept. This includes job adverts and information.
1c	To promote continuing professional development (CPD) and to support members in fulfilling their CPD obligations.	Promote to members the benefits of continuing professional development and support members in fulfilling their CPD obligations.	Helen Rushforth	Target activity for 2008 and on.	With the scheme now being mandatory this has mainly been carried out by CIPFA central direct mailing although all regional events were CPD accredited.
		Ensure that all regional and sub-regional events are acceptable for CPD purposes and promote this to members.	Regional Council / Sub-Regional Leads	Ensure that all regional and sub-regional events are acceptable for CPD purposes and promote this to members.	Yes all appropriate events CPD accredited and certificates of hours eligible were provided for all events eligible.
		Work with CIPFA employers to promote participation in CPD and to make members aware of CPD opportunities within the region.	Helen Rushforth	Identify appropriate contacts at major CIPFA employers within the region.	This is ongoing work in progress, a start has been made and will be built on in 2008.
1d	To develop effective relationships with other relevant organisations.	Identify relevant organisations within the region and seek to establish contact with key people.	Past President	Target activity for 2008 and on.	This is targeted for 2008 but there has been some 2007 implementation although some reasonable contact with ICAEW and AAT.
		Invite representatives of relevant organisations to CIPFA events.	Past President	Ensure invitations sent as relevant	As appropriate this has happened although unlike other Institutes we do not have a Regional Dinner.

			Attempt to secure places for CIPFA members at events held by relevant organisations.	Past President	Target activity for 2008 and on.	The conference for the Regions in 2008 may be a good opportunity for this. Further work to do on this activity in 2008.
2	To support and develop student members and potential student members.	2a	To maintain an understanding of the development needs of student members.	Regional President	See 1 (a)	See 1 (a)
			Undertake on an annual basis a survey of the development needs of student members and use this to inform the development of regional events and other activities.	Regional President	See 1 (a)	See 1 (a)
			Establish a facility on the regional website for members to propose ideas for events and other development opportunities.	Regional President	See 1 (a)	See 1 (a)
			Provide attendees at regional events and other activities with the opportunity to suggest ideas for future events and activities.	Regional President	See 1 (a)	See 1 (a)
			Maintain up to date knowledge of the CIPFA education and training scheme and the impact that this will have on student members.	Jennie Prewett Stephen Purser	Ensure knowledge base.	Jennie is on CIPFA Council and Stephen is National Student Forum representative on Board for Regions
		2b	To organise and promote development opportunities for	Sub Regional Leads	Target activity for 2008 and on.	See 1 (b)
			Organise at least four pan-regional events each year, open to and			

	student members across the region.	designed to appeal to student members. Organise at least four events in each established sub-regional centre each year, open to and designed to appeal to student members within that sub-region.	Sub Regional Leads	Organise at least two events in each established sub-regional centre, open to and designed to appeal to student members within that sub-region.	See 1 (b) Links are being established with the newly resurrected Wessex group to run joint events in that area.
		Identify other relevant events and opportunities that may be of interest to student members and promote them via the regional website and through other communications as appropriate.	Regional Council	Target activity for 2008 and on.	Activity scheduled for 2008 although some identified and promoted although no specific records kept.
2c	To develop effective relationships with the CIPFA Education and Training Centre (CETC) and relevant employers.	Develop and maintain effective links with CIPFA employers in the region, to identify how the region can best respond to their needs.	Regional Council	Identify appropriate contacts at major CIPFA employers within the region.	Further work needs to be done to take this activity forward.
		Invite representatives of CIPFA employers to all relevant regional and sub-regional events.	Regional Council	Target activity for 2008 and on.	Invitation sent out to all CIPFA Members but direct marketing to non member employers has yet to be done.
		Maintain effective links with CETC through invitation of CETC representatives to regional meetings and events and attendance at CETC employers' meetings in	Regional President	Ensure invitations sent.	CETC Members are invited to all Regional Council meetings and events. Stephen has attended a number of CETC employers meetings.

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the region.

	2d	To promote CIPFA to potential student members.	In cooperation with CIPFA's national marketing activities, develop and maintain effective links with colleges, universities and careers services in the region and use these links to promote public sector finance and the CIPFA qualifications as career choices.	Simon Perks	Target activity 2008 and on.	To be an activity in 2008. Simon has written a guide to organizing and running low cost high value events which will be invaluable in achieving this and other targets.	
			In cooperation with CIPFA's national marketing activities, work with public and private sector employers in the region to promote the CIPFA qualifications.	Simon Perks	Target activity 2008 and on.	See 2 (d)	
3	To develop a strong, active and diverse regional base.	3a	To develop and maintain an active and diverse network of enthusiastic volunteers across the region.	Identify and promote the ways in which members can get involved in and contribute to the activities of the region.	Simon Perks (Interim)	Target activity 2008 and on.	Initial discussions underway see 2 (d) above.
			Ensure that there is a range of volunteering opportunities available that does not require significant ongoing time commitment.	Simon Perks (Interim)	Target activity 2008 and on.	Initial discussions underway see 2 (d) above.	
			Ensure that regional and sub-regional meetings are accessible to all members	Regional Council / Sub-Regional Leads	Target activity 2008 and on.	Initial discussions underway see 2 (d) above.	

		who may wish to attend.			
3b	To ensure that our activities are accessible to members across the region, through the use of sub-regional centres of activity.	Each year, establish a new sub-regional centre within the region, which can act as a hub for activities within that sub-region. Develop where possible event formats that can be replicated successfully across the sub-regions. Ensure that representatives of sub-regions are able to meet regularly to share ideas and support each other in the achievement of the region's aims.	Regional Council	Determine which areas in the region we should target as sub-regional centres.	The Bristol sub group is now well established and we are working on the area around Poole and Bournemouth as the next sub group. This has been done in conjunction with CIPFA Central and is ongoing work. Regional Council meets on a quarterly basis.
			Regional Council / Sub-Regional Leads	Target activity 2008 and on.	
			Regional Council	Target activity 2008 and on.	
3c	To provide appropriate support, resources and development opportunities for our regional volunteers.	Provide regional volunteers with training appropriate to their roles. Encourage and facilitate contact between regional volunteers and volunteers in other regions, to permit the sharing of ideas and experiences. Promote the attendance of regional volunteers at national CIPFA events.	Simon Perks	Target activity 2008 and on.	To be developed in 2008.
			Regional President	Sponsor at least four regional volunteers to attend the Conference for the Regions so that they can share ideas and experiences with representatives of other regions and report back to the regional council.	This was done in 2007 and there is ongoing budget provision for 2008.
			Regional President	Sponsor at least four regional volunteers to attend the Annual Conference so that they can share ideas and experiences with representatives of other regions and report back to the regional council.	This was done in 2007 and there is ongoing budget provision for 2008. This includes running a draw at the Annual seminar for a member to attend the CIPFA annual conference.

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3d To conduct our activities with transparency and accountability.

Publish all regional documentation, the proceedings of all meetings and details of all regional activities on the regional website.

Produce and distribute a quarterly newsletter for all members within the region, communicating details of past and forthcoming national and regional events and other information of interest to members.

Produce and present to members an annual report of the region's activities and its performance against this strategic plan.

Website Coordinator

Simon Perks (Interim)

Regional President

Publish all regional documentation, the proceedings of all meetings and details of all regional activities on the regional website.

Develop a database of e-mail addresses of members across the region and collect e-mail addresses from members at every opportunity.

Produce and present to members an annual report of the region's activities and its performance against this strategic plan.

Website regularly updated.

Database being constantly updated and also use of CIPFA Central mailing programmes.

Completed for Annual Seminar and AGM in March 2008.









