

REGIONAL ANNUAL REPORT 2007 CIPFA NORTH EASTERN REGION (SOUTHERN DIVISION)

INTRODUCTION

The Division has, once again, had a successful year. Our primary focus remains delivering a full and varied events programme to support CPD and networking opportunities, while attempting to reach members in all areas of the Division. We continue to build on the strength of our annual events programme, and our financial position remains healthy.

Highlights this year include:

Playing a significant role in the North Eastern Region being awarded the 'Most Improved Region' for 2007.

Clare Maidment, Honorary Secretary of both the North Eastern Region and Southern Division was awarded the Doctor Hedley Marshall Award for her outstanding service to CIPFA regional activities over many years.

Establishing two new Regions, being CIPFA in the North East and CIPFA in Yorkshire and the Humber, with associated benefits including

- o Elevating the status of the two current sub divisions to full Regions;
- o Creating geographical Regions recognised and understood by the membership;
- o Creating Regions that are more responsive to the needs of members at a local level, delivering events on topics and at venues that meet local needs;
- o Better use of a finite pool of volunteers, removing the duplication and associated costs of having both Regional and Divisional Executives.

Further developing our events programme in terms of topics, accessibility, quality of speakers and high levels of attendance.

The two, day long seminars, organised by the Division were a particular success, in terms of attendance and feedback (over 95% of attendees rated the days as very good or excellent).

Presidential visit to the Region, including the presentation of certificates to newly elected members of the Institute.

We are pleased to have strengthened links with the Students, ensuring the development of varied programmes of events supporting the needs of students.

Ongoing developments with other professional Institutes. In addition to members of other Accountancy bodies attending our events, we now have PINS booklets for West Yorkshire and Humberside.

The Southern Division Executive continues to be well represented, with volunteers from across the public sector, including central government, local government, health, education and the major accountancy firms. We also enjoy the ongoing support of retired members.

Finances of the Division remain strong, with the day long events running at break even and priced to attract the maximum number of delegates.

Following the appointment of a Website coordinator in 2006, the website has been developed as a valuable tool in promoting forthcoming events and providing access to presentations.

Profile given to the Student Awards Event, including coverage in PQ magazine.

ACKNOWLEDGEMENTS

The Executive would like to thank all those involved in preparing and delivering the events programme, in particular the speakers and those who have hosted events during the year, plus members and students for their continued support of events.

Following his relocation to London, Ivan McConnell is no longer able to stand on the Executive. On behalf of the Executive, he is thanked for his time, commitment and enthusiastic support given to the Division over recent years.

In addition, Robin Thornton who was the Treasurer of the Southern Division has stood down and Mark Davies, Treasurer of the North Eastern Region will take up the post. Thanks to Robin for all his efforts in maintaining the strong financial position of the Division over recent years.

ANNUAL REPORT

Ref	Key Objective	Key Task	Performance Indicators	2007 Actual
Quartile 1				
Educating, training and continuously developing outstanding members				
	Use Regional Website to promote all events and other volunteering activities	Events and other volunteering activities are promoted on the Regional website.	All events are publicised on the Regional Website at least 2 weeks in advance of the event.	100% events publicised on the Regional website at least 2 weeks in advance of the event
	To develop the website streamlining communication channels.	Events and other volunteering activities are promoted on the Regional website.	Increase number of hits to Regional Website by 10% per annum. Slides from past events are available on website within 1 week of the event.	100% slides from past events available on the website within 1 week of the event.
	A strong events programme covering a diverse range of topics	A balanced programme of events is developed, ensuring CPD and networking opportunities for all member across the public sector.	Day long seminar at least breaks even Run 9 Divisional member and student events and 2 Regional events.	2 day long seminars broke even A total of 17 events were run across the Division . This included 6 member and 5 student divisional events and 2 Regional events. 4 further low cost events were run by the Region in association with CIPFA.
	Resources are targeted to priority areas across the Region	The budget reflects planned levels of activity and actual performance is measured against this.	Expenditure does not exceed approved budget for individual events	Achieved. Overall the costs of events were funded through income generated in running 2 chargeable events.
	Develop relations with other bodies	Develop links with HFMA, ICAEW and other bodies.	At least 1 event to be health related. To host a joint CIPFA/ HFMA event	2 health speakers at the June day long seminar. Links developed with West Yorkshire Branch of ICAEW
	To obtain E mail addresses for members/ students	E-mail group is maintained from CIPFA database of addresses plus those from delegates attending events.	To maintain an up to date record of all available e-mail addresses for Students, Diplomates and Members.	E-mail addresses maintained and updated. Addresses available for around 70% of the membership.

Quartile 2 Meeting customer needs and expectations				
	Develop analysis of attendance at events	Develop and maintain pro forma to aid analysis of attendance at events; Analyse attendance at each event	2007 to provide baseline Gross number of members and students attending local CIPFA events as a % of Regional membership; Number of individual members/students attending at least one local event at a % of total Regional membership; Number of individual employers represented at at least one local event at a % of total Regional membership	684 delegates attended events, being 37% of the Regional membership.
	Develop links and joint events with other Regions and other professional bodies	Develop links with ICAEW, HFMA and other bodies as appropriate	Publication of PINS card for Humber and West Yorkshire on a six monthly basis	PINS cards published on the Website and hard copy mailed to the membership for Humber and West Yorkshire
	Review the geographical distribution of events	Ensure that at least 1 event is held in a new location.	At least one event per annum to be held in a new location; Maintain % of members able to access at least 1 event within 1 hours drive to 2006 levels	Event held in Scunthorpe; Awaiting information from CIPFA.
	Increase the profile of CIPFA and the work of the Region.	Promote the work undertaken by the Region.	A summary of every event to be posted on the Website, ensuring the website is up to date and constantly changing. At least 2 articles per annum in a national magazine on the work of the Region (PF, Pass etc)	News items posted on the website after each event, slides added to archive of events; Articles on events and the role of the Region in Spreadsheet, PF and Pass
Quartile 3 Setting High Standards and delivering best practice				
	Identify key employers in the Region and support the provision of a CPD champion in these	Identify and provide appropriate support to CPD champions in key employers	84% Employers in the Division with 10+ CIPFA members are CPD accredited (baseline 69%)	Awaiting information from CIPFA

Quartile 4
Developing our people and making best use of our resources

	Provide value for money at events to maximise delegate attendance	Run a programme of free and low cost events in the Region	Gross number of members and students attending local CIPFA events as a % of Regional membership; Number of individual members/students attending at least one local event at a % of total Regional membership; Number of individual employers represented at at least one local event at a % of total Regional membership	684 delegates attended 15 events in the Division, being 37% of the Regional membership
	Headhunt newly qualified members to support the work of the Region	Identify and co-opt newly qualified members to support the work of the Region.	At least one newly qualified member to be actively employed in supporting the work of the Division	Luke Smith and Karl Steenson supporting the work of the Region.

ACTIVITY INDICATORS

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Activity levels for Members for 2007 are summarised as follows:

8 evening lectures	417
4 low cost seminars in association with CIPFA	133
2 one day conferences	130
1 away day	14
Aggregate attendance	<u>694</u>
Aggregate numbers of members and students in Region	<u>1833</u>
"Activity Indicator" 2007	0.38
"Activity Indicator" 2006	0.22

It should be noted that these are the aggregate figures and include CIPFA and other CCAB members.

SUMMARY OF KEY ISSUES

Highlights of 2007

Playing a significant role in the North Eastern Region being awarded the 'Most Improved Region' for 2007.

Establishing two new Regions, being CIPFA in the North East and CIPFA in Yorkshire and the Humber

Full and varied events programme

High levels of support for events, including one day seminars

Presidential visit to the Region

Positive feedback from events

PINS booklets now in place covering many areas of the Division

Key Issues faced in 2007 and going forward

Launching CIPFA in Yorkshire and the Humber and building on the strong events attendance from the former Southern Division

Ensuring greater geographical spread of events across the Region

Setting up and developing the website for the Region.

Annex 1

REGIONAL ACTIVITY INDICATORS

Please use the following examples to calculate activity indicators based on attendance at regional events in 2007.

ACTIVITY LEVELS – WORKED EXAMPLE 1

10 evening lectures x 35 delegates	350
1 one day conference x 120	120
4 half day workshops x 15	60
4 audit training seminars x 50	200
1 Regional AGM	45
Aggregate attendance	775
Aggregate numbers of members and students in Region	2817
“Activity Indicator”	0.28

ACTIVITY LEVELS – WORKED EXAMPLE 2

Aggregate attendance	390
<i>Made up of:</i>	
Members	275
Students	115
<i>Numbers in Region:</i>	
Members	2410
Students	407
<i>“Activity Indicators”:</i>	
Aggregate	0.14
Members	0.11
Students	0.28