

CIPFA in the MIDLANDS ANNUAL REPORT 2006

PART 1

INTRODUCTION FROM PRESIDENT

Cipfa in the Midlands (CIM) has made excellent progress during 2006. By improving the way we communicate and engage with members and students across the Midlands, we are strengthening the CIPFA community of interest and widening meaningful involvement in our Institute. CIM has an established longstanding practice of investing in the training and development of members and students in the Region.

Our efforts have been focused on supporting the National Development Strategy's seven Hallmarks in ways that are sensitive to our Region's needs. We have sought to meet the expectations and aspirations of our members and have prepared the ground for the continued development of our region and institute in the future.

Our Region's strategic direction was reaffirmed at our 2005 AGM and is focused on the following guiding principles:

- Enhancing the eminence of our region and Institute;
- Responding to the diversity agenda in public services;
- Adding value to our members.

I am delighted to report that we have made significant progress in 2006 on the delivery of these principles. Our efforts have been around these three themed work areas; with every council member being involved in one or more of these themes:

- CPD - developing and implementing a robust regional strategy to complement national developments and help and support members.
- Communications - increasing engagement by further enhancing the quality and effectiveness of our methods of communication to all members using the most appropriate mechanisms.

- Impact - maximising our profile within the local and national public services and professional communities through the mobilisation and effective participation of our member and volunteer network.

In addition, we continue to support and are supported by an area structure, essential in a region which covers such a huge geographical area. Our most significant success in this area has been the re-introduction of the six form management game by our western area. We plan to export this “know how” in 2007.

Mark Lawrie
President
CIPFA in the Midlands

PART 2

DEVELOPMENT PLAN

Hallmark 1 Accessible and Responsive

An institute which is open and accessible, and responsive to the needs of its members and students, including those who wish to contribute to its work as volunteers.

Key Activity	Performance Indicator(s)	Budget	Outturn
1. Promote a number of training/ development events. specific targets: a) hold a quality annual seminar in order to raise the profile of the Region b) at least 18 events in the Region c) to create thriving regional organisations through increasing the proportion of events delivered through the Southern, Northern and South Eastern Regions.	target attendance - 70 average attendance - 25		110 booked * see below
2. Promote and further develop the CIM Website. Specific targets: a) continue to develop the website b) increase usage of website c) work with Robert Street to re-brand the CIM website and logo and aim to re-launch the "new look website" during 2006	region in top 2 of regions for "hits"		Achieved Achieved
2. Promote more effective communication <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <ul style="list-style-type: none"> • 2 western area events • 1 northern area event • 1 insurance officer group meeting • 1 agm • 2 6th Form games • annual seminar • annual dinner • 4 cats seminars • 2 December club meetings </div> regional representative.			Achieved 3 Achieved e-delivered to 1,906.

Hallmark 2 Strong Sustainable Growth

An Institute which is making significant strides to grow its membership and to broaden its reputation across the full breadth of the public services in the UK and the Republic of Ireland, and which is also gaining ground internationally.

Key Activity	Performance Indicator(s)	Budget	Outturn
1. Raise awareness of CIPFA in schools. Specific targets: a) run a sixth form management games	1 in each of the area		2 in western area
2. Encourage student involvement in regional activities. a) develop Student Society.. b) maintain a minimum of 2 students on the Regional Council. c) arrange events at CETC and Nottingham University to encourage student involvement d) convene a meeting of case study examiners and deliver an event in conjunction with the colleges e) Investigate the involvement of the Student's Society in the Sixth Form Management Games	2 students at least 1 at each venue		Achieved Achieved Achieved
3. Distribute information on careers fairs being held in the Region. Aim to have representatives from CIM at all careers fairs at which CIPFA has a presence	Attendance at careers fairs		Achieved

Hallmark 3 Upholding Highest Standards

An institute which exudes and promotes the very highest standards of probity, conduct, professionalism and equality of opportunity.

Key Activity	Performance Indicator(s)	Budget	Outturn
1. To involve new members in the region. Specific targets: a) invite new members to AGM to receive their certificates b) Publicise, develop and maintain a self-help database, including investigating the use of web logs to create active web for during 2005/06 c) To personally approach individuals through our existing networks to raise awareness of the region and encourage participation.	target attendance 15 data base created new people participating as a result of approaches		Invited 42 – 14 attended Achieved

<p>2. To promote CPD. Specific targets:</p> <p>a) to achieve upper quartile by making presentations to employers meetings, e mailing non participants, mailshots to employers to raise awareness of “Accredited Schemes” and media articles</p> <p>b) To issue CPD “certificates” at each regional/area event.</p>	<p>2 presentations to employers meetings or media shots or mailshots</p> <p>CPD certificates issued</p>		Achieved
<p>3. To recognise involvement of volunteers. Specific targets:</p> <p>a) to submit a nomination for the Dr Hedley Marshall Memorial Award.</p> <p>b) To undertake specialist training events.</p> <p>c) To undertake the series of audit training events (CATS seminars)</p> <p>d) recognise outstanding contributions to CIM by invitations to Annual Dinner as a guest of the Council</p> <p>e) Investigate the possibility of widening the guest list at the CIM annual dinner to include all Members and contributors to promote networking. Investigate holding the Annual Dinner on the same day as the Regional Seminar.</p> <p>f) To ensure we use quality venues for meetings and seminars.</p> <p>g) To explore personal development opportunities for CIM council members</p>	<p>-total no. of events 4</p> <p>-total attendance 280</p> <p>x invitations issued</p> <p>x invitations issued</p> <p>Quality venues used</p>		<p>Completed – won by LP</p> <p>Achieved</p> <p>348 booked to date</p> <p>Achieved</p> <p>Achieved</p> <p>Achieved</p>

Hallmark 4 Influential in the Profession

An institute which is acknowledged to be a significant influence within the Consultative Committee of Accountancy Bodies in the UK and Republic of Ireland, and internationally.

Key Activity	Performance Indicator(s)	Budget	Outturn
1. To strengthen contact with other bodies. Specific targets: a) ensure representatives of AAT and HFMA on regional council. b) attendance of President at other bodies' events. c) Identify scope for joint events with the AAT, IRRV, HFMA and Insurance group - Organise Annual Regional Dinner inviting influential representatives as guests - Organise an Annual Seminar inviting influential representatives as guests - Encourage and facilitate participation of CIM members on national panels, events, speaking engagements and other networking opportunities.	Reps on council Joint events potential scoped Invite influential others to the dinner Seminar took place Involvement of CIM members in other activities		Achieved Achieved Achieved Achieved

Hallmark 5 High Profile in the Public Services

An institute which is well known, influential and highly regarded within its core public service markets and more widely.

Key Activity	Performance Indicator(s)	Budget	Outturn
1. Raise the profile of the region through the local mainstream and professional media	At least 2 articles		Achieved
2. Attend further meetings with Chief Finance Officers to discuss CPD and greater volunteer involvement.	2 meetings		Achieved
3. Network with other Regional CPD advisers twice a year	Attend meetings		Achieved
4. Members Development Panel representative for CPD	Nominated person attends		Achieved
5. More visible representation at national and local events, seminars etc – use of the CIPFA/CIM “brand” when members are participating	Use of banner/ logo on material etc		Achieved

6. Publicise key events such including the Annual Seminar and Annual Dinner in the local press and Pubic Finance	Advert appears		Achieved
7. Raise the profile of CIM with its own Members through an article in Centrepape detailing our core activities an how people can get involved in the Regional agenda	Article appears		Achieved

Hallmark 6 Delivering Real Improvements on the Ground

An institute which is widely recognised to be playing a significant role in the development and implementation of real improvements in the public services provided to and for citizens.

No additional Regional Targets. All other Hallmark targets aim to deliver Hallmark 6.

Hallmark 7 Best Use of Resources

An institute which conducts its business efficiently and makes best use of the resources at its disposal.

Key Activity	Performance Indicator(s)	Budget	Outturn
1. More efficient use of resources. Specific targets: a) Seek sponsorship for "Centrepape" b) More use of e-mail to reduce cost of postage. c) Seek organisations to accommodate meetings without charging	Sponsorship sought Greater use of email Free use of rooms secured		Achieved
2. Seek sponsorship for Sixth Form Management Games	Sponsorship achieved		Achieved
3. Seek sponsorship for the Annual Dinner	Sponsorship achieved		Achieved
4. Compile a list of organisations that are willing to sponsor CIM	List compiled		Achieved
5. Submit a development bid to CIPFA to support the 6 th Form Management Games and to support CIM branded merchandise for use at regionally hosted careers fairs	Bid submitted		Achieved
6. Undertake a ZBB exercise of our finances to maximise the financial resources available to us and adopt a medium term financial strategy.	Reworked budget published		On-going

PART 3

ACTIVITY INDICATORS

ACTIVITY LEVEL 1

1 Regional AGM	32
1 Regional Seminar	103
1 Regional Dinner	88
2 Student Society events	75
3 Area executive events	171
2 6th Form Games	30
4 CATS Seminars	351
2 December Club outings	<u>56</u>

Aggregate Attendance 906

Aggregate number of members and students in the
Region 2,879

"Activity Indicator" 0.32

ACTIVITY LEVEL 2

Aggregate Attendance	434
<i>Made up of</i>	
Members	313
Students	121
Numbers in the Region	
Aggregate	2,879
<i>Made up of</i>	
Members	2,380
Students	499

Activity Indicators

Aggregate	0.15
Members	0.13
Students	0.24

PART 4

SUMMARY OF KEY ISSUES

a) Highlights of 2006

- Annual Regional Seminar and Dinner – the full day seminar entitled, “Managing, Leading and Dealing with Change” was held at the Hyatt Regency Hotel in Birmingham in November, and was attended by over 100 people. It was followed by a black tie dinner which was attended by around 80 people. Following the success of the event, we have agreed to hold another seminar and dinner at the same venue in November 2007.
- Lesley Piper of CIM was presented with the Dr Hedley Marshall Award at the Conference for the Regions in Glasgow, in recognition of her substantial contributions to the Midlands region.
- Following the previous years success, two more 6th Form Management Team Games were held in July and September, with a total of 13 teams entered from 12 Midland schools. It is hoped that two more sets of games will be run in 2007.
- The Southern Area Executive was revived and is planning its first event which will take place in January 2007.
- The CIPFA in the Midlands Audit Training Seminars (CATS) group organised another series of highly successful audit training seminars, with an average of 80 delegates attending each of the 4 events.

b) Key Issues faced in 2006

- The reliance on volunteers to deliver our ambitious plans continues to be a challenge. We are very fortunate to have many highly skilled and experienced volunteers in CIM, but in order to take this to the next level; we are looking to a new regional support structure.
- This year we have been facing the problems associated with trying to deliver events over the entire length and breadth of our huge geographical region in order to provide greater equality of access by all our members. In particular, events in the Northern Area have declined due to a lack of people willing to volunteer to organise them.
- The CIM Student Society has become less active due to a lack of student volunteers who fulfil the membership criteria. The current Vice President is hoping to re-launch the Student Society in 2007.