



CIPFA

NORTHERN IRELAND BRANCH

2008
Development Plan
and
Website Strategy

AT THE HEART OF
PUBLIC SERVICES



INTRODUCTION

OVERVIEW

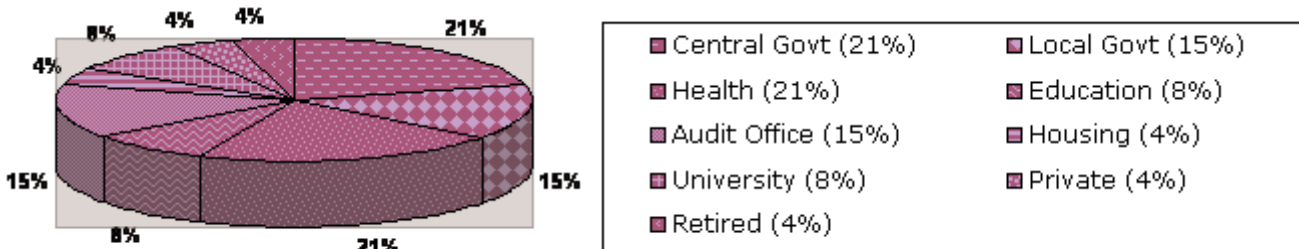
CIPFA is the leading accountancy body for public services, whether in the public or private sectors. Existing members in the United Kingdom and Republic of Ireland occupy positions in local authorities, Health Service Trusts, Central Government, Agencies, Education and Health as well as private sector companies.

The Northern Ireland (NI) Branch is one of the smallest regional CIPFA Branches in the United Kingdom with 170 CIPFA qualified full members, but with 130 students the number of Branch members is growing steadily.

The current Chairperson of the CIPFA NI Branch is Mark McBride. Mark is Business Support Manager for the Health and Environmental Services Department in Belfast City Council.

BRANCH MEMBERSHIP PROFILE

A breakdown of the CIPFA NI membership by sector is provided below.



BRANCH COMMITTEE

The Branch in NI comprises a Chairperson and a Branch Committee as follows:

Branch Officers:

- Chairperson – Mark McBride
- Past Chair – Heather Cousins
- Honorary Treasurer – Jonathan Adams
- Ex Officio member (Head of CIPFA NI) – David Nicholl
- Vice Chairperson – Michael Carson
- Honorary Secretary – Patricia Blair
- Council Member – Trevor Salmon

Ten CIPFA members as follows:

- Una McGuinness (CIPFA)
- Kathryn Thomson (NDPB)
- Danny McConnell (Consultancy)
- Steve Mungavin (CIPFA)
- Jonathan Adams (Education)
- Michele Woods (Central Government)
- Peter Harvey (Health)
- Joanne Devlin (Consultancy)
- Adrian Murphy (Central Government)
- Michael Tattersall (Central Government)

The Branch has two sub-groups

(1) Events Sub-Committee, which comprises the following members:

- Patricia Blair
- David Clement
- Gerry Crossan
- David Nicholl
- Kathryn Thomson
- Michael Carson
- Heather Cousins
- Peter Harvey
- Nicola Briggs
- Stephen Dolan

(2) The PAQ Advisory Committee, which comprises the following members:

- Heather Cousins
- Billy Lyttle
- Steve Mungavin
- Michele Woods
- Una McGuinness

In addition to the above sub-groups, the Branch has established an Editorial Board that oversees the publication of the Branch newsletter called 'The Account'. The following are on the Board:

- Alison Caldwell
- Heather Cousins
- Diane Forsythe
- Tim Johnston
- Steve Mungavin
- David Nicholl
- David Reid
- Ian Winton
- Brigitte Worth

A number of CIPFA members and other public sector executives also serve on Institute panels and committees as shown in the table on the following page.

Institute Panels/Committees	CIPFA Member	Institute Panels/Committees	CIPFA Member
CIPFA Council	Trevor Salmon & Mark McBride	Audit Panel	Derek Anderson
Charities Panel	Sharon Brown	Financial Management Panel	Heather Cousins
Competitiveness Joint Committee	David Nicholl	Best Value Working Group	Brian Kernohan
Social Services Panel	Nicola Briggs	Education and Training Committee	Trevor Salmon
Board of the Regions	Mark McBride	Members Development Panel	Mark McBride
Health Panel	Stanley Taggart	Investigation Committee	David Clement
Central Government Panel	John Smith	Local Authority Accounting Panel	Graham Coulter
Local Government Policy Panel	John Buchanan, Graham Coulter & Marie Finnegan	International Committee	Trevor Salmon
Qualifications Development Panel	Colin Langford	National Student Forum	Kerri Burgess
Police Panel	David Best	RSL Panel	Michael Rafferty

FUNCTIONS OF CIPFA IN NI

The main functions of the CIPFA Branch include the following:

- To promote the policies and reputation of the Institute within the Region
- To recommend to the Institute Council the scope and content of services necessary, at local level, to meet the needs and aspirations of individual members and students
- To provide a forum and act as the mechanism for regular two way communication on the development and running of the Institute between the Region's members and students and the Institute Council
- To ensure, locally, the delivery of an annual programme of activities, designed to secure the updating of members and students on current issues and to enhance professional skills
- To facilitate the participation of as many members, students and others with an interest in public finance as possible in the activities of the Institute through local events and activities
- To work with the Institute Council, the local CIPFA Office as training provider, and the CIPFA marketing department to promote education and training activities, including post qualification training
- To secure effective liaison with other professional bodies
- To act as one of the means of consultation between the Institute Council, Committees and the membership on major issues affecting the professional responsibilities of members
- To support the CIPFA NI Office in its efforts to enhance the profile of CIPFA in NI

STAKEHOLDERS

The principal stakeholders in the Branch are:

Members

Who will gain by the backing of a strong Branch structure and an Institute with an acknowledged expertise and standing in the NI public sector.

Students

Like members, students wish to gain a qualification acknowledged as the premier public sector accounting qualification. They also need to be supported in their studies and made to feel part of the Institute in NI.

Managers/Employers and others with an interest in improving public finance and management

Senior managers and executives of organisations in the public sector and voluntary sector have much to gain from the financial management expertise that CIPFA provides through:

- Qualified CIPFA members
- Events and courses
- Advice and support from CIPFA locally

CIPFA NI Office

The CIPFA NI Office is the full time secretariat for the Institute in NI. The Office has a proactive role in raising the Institute profile in NI and promoting Institute activities.

CIPFA Regions

An active Branch will contribute to NI's input into CIPFA policies and activities in London and other regions.

KEY THEMES FOR 2008

- Maintain high performance on delivery of Branch events
- Build the Branch Committee by involving new members
- Contribute to CIPFA nationally through the head office and regional network
- Build on a sound financial base
- Further develop support arrangements for CIPFA's Professional Accountancy Qualification
- Support the development of a Student Society
- Support the establishment of a NI Student Award and a Public Sector Financial Reporting Award

CIPFA NI BRANCH 2008 SWOT ANALYSIS

Strengths

- Effective core of volunteer support on Branch Committee
- High level of CIPFA member involvement:
 - CIPFA Panels
 - Training and development
 - CPD
 - Branch Committees
 - CIPFA publications
- CIPFA NI Office:
 - Secretarial etc. support
 - Good relationship with Branch
 - Involvement in professional qualification training
- The CIPFA NI Annual Conference
- CIPFA NI Newsletter 'The Account'
- Good range of member services and activities:
 - Programme of events
 - Members helpline
 - The Account
 - Annual Chairperson's Luncheon
- Excellent database of members (e-mails, addresses etc.) and key players in NI public services

- Strong finance base
- Profile of CIPFA and level of goodwill towards CIPFA in NI public services

Weaknesses

- Dependence of Branch on CIPFA NI Office
- Time pressures on Branch volunteers
- Apathy from some members
- Sub-optimal links between CIPFA Panels and the Branch Committee
- Ineffective central systems in the Institute's head office

Opportunities

- CIPFA NI reputation and goodwill, as evidenced by the recent NICS trainee scheme
- Review of Public Administration – opportunity to input into policy initiatives

Threats

- Lack of succession planning to include new members of the Branch Committee
- Review of Public Administration

DEVELOPMENT PLAN 2008

1 Educating, Training and Continuously Developing Outstanding Members

Key Activity	Performance Indicator(s)	Responsibility
Promote a number of training and development events	<ul style="list-style-type: none"> • Hold at least five lunchtime events during 2008 • Maintain the increase in numbers of attendees at the 2008 AGM 	<p>Events Sub-Group</p> <p>Each Committee member</p>
Improve communications with members	<ul style="list-style-type: none"> • Operate a members' helpline, which will respond to queries within 24 hours • Organise an annual debate on a public sector topic • Publish 'The Account' three times per year. • Support CIPFA Education & Training Division by undertaking exam invigilation 2 times per year • Contribute to 'Spreadsheet' • Review existing panel representation and nominations to panels 	<p>CIPFA NI Office</p> <p>Events Sub-Group/CIPFA NI Office</p> <p>Events Sub-Group</p> <p>Committee members</p> <p>Events Sub-Group</p> <p>M McBride</p>
To promote CIPFA's qualifications to potential students	<ul style="list-style-type: none"> • Make an annual presentation to AAT students • Make an annual presentation to public sector employers • Make an annual presentation to NI University students 	<p>U McGuinness</p> <p>U McGuinness</p> <p>U McGuinness</p>

Key Activity	Performance Indicator(s)	Responsibility
To provide support to students undertaking the professional qualification	<ul style="list-style-type: none"> Consider innovative ways to support students Encourage and support the development of a Student Society 	Committee members Committee members

2 Meeting Customer Needs and Expectations

Key Activity	Key Performance Indicator(s)	Responsibility
Promote CPD	<ul style="list-style-type: none"> Increase CPD activity from 90% to 93% 	CPD Advisor
Recognise involvement of volunteers	<ul style="list-style-type: none"> Submit nominations, if appropriate, for CIPFA awards and Bye Laws 5 & 6 membership 	Committee members
Support prestigious events	<ul style="list-style-type: none"> Contribute to planning for the CIPFA NI Annual Conference Organise the Annual Chairperson's Luncheon 	Events Sub-Group Events Sub-Group

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

Key Activity	Performance Indicator(s)	Responsibility
To assist in the development of best practice guides and CIPFA Codes of Practice	<ul style="list-style-type: none"> Contribute to two publications per year 	CIPFA NI Office

4 *Developing our People and Making Best Use of our Resources*

Key Activity	Performance Indicator(s)	Responsibility
To ensure high standards for the use of resources	<ul style="list-style-type: none"> To deliver objectives within approved resource allocation To provide financial activity analysis to each Branch Committee meeting To provide Finance Report to AGM To obtain sponsorship for key Branch events, including 'The Account', lunchtime events, Annual Conference and Chairperson's Luncheon Ensure that CIPFA NI website is kept up-to-date 	Branch Committee Treasurer Treasurer and CIPFA NI Office Web Author
To ensure high accountability and transparency of Branch resources to members	<ul style="list-style-type: none"> Promote all Branch events Provide opportunities for volunteer involvement 	Committee members and CIPFA NI Office Committee members

CONCLUDING REMARKS

This development plan outlines the key priorities for the CIPFA NI Branch in 2008. It includes challenging performance indicators which aim to increase the already high levels of performance in areas such as the delivery of Branch events and the level of CPD uptake amongst members in NI.

One of the key features of the 2008 plan is to consider specific initiatives which look to sustain the growth of membership in NI, to increase the visible presence of the Branch to students through exploring the possibility of an annual student award and supporting the development of a student society. The Branch is also seeking to raise further the profile of the Institute in NI through a potential NI Financial Reporting Award and will explore the potential of this during 2008.

The officers and members of the Branch Committee are looking forward to another successful year for CIPFA in NI.

**CIPFA (NI) BRANCH
BUDGET FOR THE YEAR ENDED 31 DECEMBER 2008**

APPENDIX A

Note	2008 £	2008 £
Incoming Resources		
<i>Incoming resources from generated funds:</i>		
Donations	Nil	
Investment income	<u>300</u>	
		300
<i>Incoming resources from charitable activities:</i>		
Advancing public finance and promoting best practice	12,050	
Educating and training students	<u>Nil</u>	
		12,050
<i>Other incoming resources:</i>		
Subvention	3,800	
		<u>3,800</u>
Total Incoming Resources		<u>16,150</u>

Resources Expended*Charitable activities:*

Advancing public finance and promoting best practice	13,900	
Educating and training students	Nil	
Regulating and supporting members	150	
	<hr/>	14,050

Governance:

Regional Council and audit	3,500	
	<hr/>	

Total Resources Expended

17,550

Net Incoming/(Outgoing) Resources

(1,400)

Gains/(losses) on investment assets:

Nil

Net Movement in Funds

(1,400)

Reserves @ 1 January 2007

32,082

Projected reserves @ 31 December 2007

32,232

Projected reserves @ 31 December 2008

30,832

**CIPFA (NI) Branch
2008 Budget Notes (excluding VAT)**

Income

Sponsorship – Events	3,750	
Sponsorship – Chairperson’s Luncheon	2,300	
Event Income (5 events x 50 attendees = 250 @ £24)	<u>6,000</u>	
Sub Total - Income		12,050
Investment Income		300
Subvention		<u>3,800</u>
TOTAL - Income		<u>16,150</u>

Expenditure

Events (5 events @ 1100.00)	5,500	
Public Sector Debate	4,200	
Chairperson’s Luncheon	<u>4,200</u>	
Sub Total		13,900

Regulating and Supporting Members 150

Governance

- Conference of Regions	1,100	
- Branch Expenses (print & issue development plan, diaries, Branch and travel expenses)	<u>2,400</u>	<u>3,500</u>
TOTAL Expenditure		<u>17,550</u>

Surplus/(Deficit) (1,400)

APPENDIX A



CIPFA NI Branch
Website Strategy 2008

INTRODUCTION

The CIPFA NI Branch aims to support CIPFA's position as the leading accountancy body for public services by informing and debating policy-making at national and local level.

It will also act as a community of interest in order to facilitate networking opportunities for Branch members to share ideas and achievements, to help spread best practice and to promote and support regional events.

- In line with the Branch Constitution, the NI Website Co-ordinator will consider Branch members to be:
 - CIPFA members in NI (including retired Members)
 - CIPFA student members in NI
 - Any other individuals or groups defined as Branch members by the NI Branch Committee
- The website strategy will be consistent with the aims of the CIPFA NI Branch, as set out in page 6 of this document
- Good communication is important for achieving the aims and objectives of the Branch and its website should be viewed as a vital part of the overall communication strategy

GUIDING PRINCIPLES

- The Branch's website strategy is founded on the following guiding principles:
 - Communication processes will be known and transparent
 - Documents approved as 'Final' by the Branch Committee will be made publicly available on the website, unless there is a convincing reason otherwise e.g. commercial sensitivity
 - Communication methods used on the website should be easy to access, easy to use, robust and reliable
 - Feedback from Branch members is extremely welcome and should be actively encouraged
 - Historic documents may be of future use to Branch members and will therefore be archived rather than deleted
- Improvements in communication are intended primarily for the benefit of Branch members
- Decision-making and organisational structures that support effective communication by, for example, ensuring clear accountability for outcomes

KEY AIMS OF THE WEBSITE STRATEGY

- The website strategy supports the aims and objectives of the CIPFA NI Branch, promotes the activities that it organises, and assists the efficient running of the region
- The key aims of the website strategy is to:
 - Promote the CIPFA NI Branch and its activities in a coherent way
 - Improve communication between the CIPFA NI Branch Committee, Branch members and any other interested parties

- Make it easy for people to find out about Branch services and events
- Aid in the establishment of contact networks for use by Branch members
- Publicise Branch members' views and opinions, when appropriate
- Make effective use of the technology provided and seek to push its limits
- Maintain and further develop the website's image as one that is well maintained and supported

KEY PERFORMANCE INDICATORS

- To measure the success of the website, a number of key performance indicators will be developed
- Usage statistics detailing user activity are provided by CIPFA London on a monthly basis. This data will be reported at each Branch Committee meeting and subsequently published on the website:
 - Total number of visits (to date)
 - The ratio of visits to CIPFA members/students (running six month duration)
 - The number of visits per NI Region page (running six month duration)
 - Raw statistical data for the NI Region (to date)
- Periodic surveys of Branch members will be conducted and the results will be published on the website, when appropriate. The surveys will:
 - Test user satisfaction and communication effectiveness
 - Help indicate where future developments should be directed
 - Enable the NI Website Co-ordinator to gather additional information on specific user-groups, as necessary
- During 2008, the aim is to increase the total number of visits to the website by 10%

KEY METHODS USED TO DELIVER THE STRATEGIC AIMS

- The website aims to capture all relevant news, events and information generated from CIPFA NI Branch activities
- CIPFA NI Branch Committee will:
 - Keep the NI Website Co-ordinator informed of any relevant items for inclusion on the website
 - Include an item to cover 'website-related matters' on each Branch Committee meeting agenda
 - Supply requested content or respond indicating why such content is not available
 - An individual will be assigned to each of the following areas as a contact person for the NI Website Co-ordinator
 - * CPD
 - * Events
 - * 'The Account'
 - * Member Profiles
 - * Retired Members
 - * Students
 - * Volunteers
 - * Other areas requested by NI Website Co-ordinator

- The NI Website Co-ordinator will:
 - Retain full and final editorial control of all website content, subject to any policies approved by NI Branch Committee or specific decisions regard the NI Branch website
 - Actively pursue new content for the website by liaising with Branch Committee members, CIPFA NI Office, Branch members and any other interested parties, as necessary
 - Report on the website activity and development progress at each Branch Committee meeting, or have another individual report on his behalf
 - Maintain regular contact with CIPFA, CIPFA NI Office, other regional website co-ordinators and other relevant stakeholder groups, as necessary:
 - * To ensure compliance with all Institute and legislative requirements
 - * To aid in the development of new features

CURRENT POSITION

- Statistical data prior to July 2006 is incomplete and in some cases appears to mix the NI Branch website with the CIPFA NI Office website. This data is therefore deemed to be unreliable. The remaining statistics currently cover July 2006 to May 2007
- Website Activity By Quarter

Date	Average Monthly Hits	Total Hits
2006 Q3	505	1,517
2006 Q4	472	1,418
2007 Q1	859	2,577
2007 Q2	1,044	3,132

PLANNED DEVELOPMENTS FOR 2008

- The following items should only be taken as indicative of the general developmental direction of the website: [further items may be identified during the life of this strategy]

- Continuing Professional Development (CPD) area – this area will be updated to provide up-to-date information to Branch members on CPD, covering:
 - General information on current CPD requirements with a link to the main CIPFA CPD site for detailed information
 - Contact details for any CPD Advisors
- Students' area – this area will provide student members with relevant information covering:
 - Relevant dates
 - Relevant links
 - Profiles of students
- Branch photo album – the photo album will be updated as new photos become available to the NI Website Co-ordinator
- Retired members – this page will provide details of the benefits that the Branch provides for retired members and contact details for an individual that they can approach with any queries
- Volunteers area – this area will provide background information on the sort of work volunteers can undertake and the benefits. It will also include:
 - Details of the current volunteers and volunteering vacancies
 - An on-line volunteer form to enable Branch members or other interested parties to indicate their willingness to volunteer
- Member profiles – periodically a profile of Branch members will be added to this page, previous profiles will be archived on the site

- Lunchtime events – the lunchtime events page will be updated throughout the year with supporting documents from past events and, when appropriate, details of 2008 and subsequent year's events



CIPFA Northern Ireland
3rd Floor
Lesley Exchange 2
22 East Bridge Street
BELFAST
BT1 3NR

Tel: 028 9026 6770
Fax: 028 9026 6771

www.cipfa.org.uk/regions/ni/index.cfm

AT THE HEART OF
PUBLIC SERVICES

