

# Spreadsheet

CIPFA.ORG | NEWS FOR MEMBERS AND STUDENTS

SEPTEMBER 2017



## CIPFA Annual Conference

Brexit, AI, austerity and more were at the forefront of the Annual Conference

### in this issue

[Fraud Risk Management in the social housing sector](#)

[Public Sector Paperless Awards 2017](#)

[CIPFA Student Conference 2017](#)

[Consultations Issued by CIPFAs Boards and Panels](#)

**CIPFA**

# Message from the President

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After years of reading Spreadsheet, I cannot quite believe that as CIPFA's new president, it is now my duty to write the opening message. I am really pleased and proud to have been elected to this role and am committed to continuing with all the great work that the past president, Brian Roberts, oversaw during his tenure.

However, as is tradition, I have my own three themes that I will focus on throughout the year. These are: the importance of medium term financial planning and the sustainability of public finances, better alignment and collaboration in the sector and the role that digitalisation can play to boost delivery and outcomes.

The first theme is of significant importance to CIPFA, as evident in CIPFA's fantastic array of practical support and advice to help its members improve their organisation's financial resilience. However, there is still more work to do, and I will focus on how balance sheets and capital investments, as well as revenue budgets, can be used to improve public services.

The second theme, alignment of public services, is also of critical importance. The benefits of alignment and collaboration are already being realised in health and social care, showing us all the benefit of breaking down silos. Now it is time to look at how such working can benefit and add value to the whole sector.

The third theme, the role of the digital in public services, is one of great personal interest to me. Technology and software, such as AI and digital data, could help transform public financial management for the benefit of the people and places we serve. CIPFA needs to be at the forefront of such change and I am looking forward to helping the Institute with this.

CIPFA's Annual Conference was a great opportunity to discuss my three presidential themes, and I enjoyed discussing them with those of you I met there. This year's Conference – with its speakers, workshops and fringe events – was a great success. I hope you enjoy this issue of Spreadsheet that provides a recap of the jam-packed two days.

Since Conference, I have met the new council members and regional chairs at their inductions. However, I am keen to hear from all CIPFA members and students throughout the regions about how best we can help each other build our influence, grow our membership and develop our services. I already have plans to go to Scotland, Northern Ireland, the North East, South West, South East and my home region in the Midlands in the autumn. It's going to be a busy few months!

I hope everyone has an enjoyable and relaxing summer.

*Andy Burns*

**Andy Burns,  
President**




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## The future's bright... isn't it?

As Spreadsheet navigated our way through the conference's range of talks, presentations and workshops, common themes began to emerge. One that came up time and time again was the debate about what the future holds for public sector finance.

One topic that is seldom out of the limelight is the future of the NHS. "It is one of the best services in the world," declared Jim Mackey, CEO of NHS Improvement, referencing the service's swift response to the recent tragic events in the UK, such as the Grenfell Tower fire and the Manchester concert bombing. To get anywhere with solving the NHS's financial difficulties Mackey insisted that we must "not get distracted by politics, instead focus on the people we're helping and the service we're providing."

Niall Dickson, CEO of NHS Confederation, made it clear that just tackling "the money problem" was not enough. "What we deliver and how, must change," he said during the same session. "The future must be more joined up and integrated – we have to use data to break down the barriers to integration. We need to move to a new compact between patients, the public and practices, to not only deliver services but exceed expectations."

What will public sector accounting look like in 2030? That was the question explored in the conference workshop 'Changing Role of the Finance Professional'. According to Mark Nittler, Vice President of Workday, most organisations' systems are "built for the past". A change in attitude is needed, said Nittler, which includes taking account of people as assets – something that most annual reports do not do. "The future is not manufacturing, but service," he claimed. Nittler delivered one statistic that really made the room sit up and take notice: The Economist has reported that it is possible to automate

94% of auditing and accountancy functions. Paul Clarke, Head of Finance at the London Borough of Barnet, predicted that instead of squinting at the spreadsheet mainstay we will be managing data over the phone and online, in real time.

The technology of the future came up in another workshop, 'Crossing the Chasm: Is Your Community Leaving You Behind?' Simon Robinson, the Founder and Managing Director of ERPaaS, said that AI is one of the fastest areas of technological growth worldwide, and that the UK is seen as one of the innovators. He compared the shift to "the turmoil of the 'dot.com' era in 1991-2001, only less visible."

Robinson's examples of how new tech can increase efficiency included an automated system that can process 1,000 emails a day, its cognitive AI identifying 800 that warrant an automated response, leaving the remaining 200 to be actioned by the human workforce, thus saving both time and manpower. He called this kind of innovation "working smarter, using your people resources in a cleverer way." He added: "Are we doomed? No. We must just use our knowledge intuitively with our stakeholders, automating that knowledge. This is not the future, it's the present."

Elsewhere, Evgeny Morozov, an author and essayist, introduced himself as a 'technology sceptic', listed examples of where household-name firms such as Apple, Uber, Microsoft and Google have provided public sector projects in areas such as health, transport and education with affordable assistance to develop services and manage demand – mostly in the US, but increasingly in Europe. He said that the firms' help to complete infrastructure that is underfunded or stalled may solve a short-term problem, but he warned that the sector would be damaged in the long term when the firms then start to charge huge prices

for their services and sharing their data. He warned that we risk relying on these 'saviours' and creating a "privatised digital welfare state."

Morozov went on to describe how for years these companies have been gathering the public's data, by providing cheap services and products and through advertising, in order to develop their AI, which they will ultimately use to monopolise the market and eliminate all competition. Once Google et al are the only options, they will be able to charge us whatever they like for previously free or cheap services.

Elsewhere, Eamonn Boylan, Chief Executive, Greater Manchester Combined Authority, outlined his ideas for tackling the housing crisis. He told delegates that the current delivery model has clearly failed, regardless of which government has been in place. But planners are not the problem, he said: the issue is delivery. Projects often fail to deliver because of a lack of funding; a need to diversify the investment platform was one of the four steps Boylan laid out that must be taken to tackle this. He cited examples of this happening right now in the conference's host city, such as through the Greater Manchester Pension Fund and with the family that owns Manchester City Football Club.

Also essential, according to Boylan, are unlocking existing housing assets which may have been ignored; encouraging potential investors to see housing as somewhere attractive to put their money; and creating a proper plan for growth – although he did warn that it would be unwise to "dash for growth if it means a flight from quality."

Whatever may actually end up appearing over the horizon for public sector finance, it was fascinating to spend two days among the thoughts of some of the sector's most insightful minds.

**New delivery models have a growing track record of achieving “more for less” in the public sector**

*By Mark Williams, CIPFA Governments Faculty Board and SE Regional Council*

Given the ongoing financial pressures on the public purse, new delivery models (NDMs), being alternative approaches of structuring public service delivery, offer real opportunities to improve outcomes and reduce costs.

NDMs offer an alternate to incremental, piecemeal cost reduction. The range of NDM options fall broadly into three groups: those based on contractual arrangements; those based on an entity; and those that include both. Examples of contract based NDMs include outsourcing, licensing, payment by results/outcome based commissioning, franchising, in sourced management, and shared services. Examples of entity based NDMs include joint ventures, local asset backed vehicles, government-owned companies (GovCo), social enterprises and mutuals.

Given the opportunity to improve outcomes and reduce costs, I believe that public bodies should be considering the potential value of adopting NDMs in their organisation. However, going down this route can be complex and requires careful preparation.

In terms of planning, one of the first steps should be to evaluate the current position and performance of the public service. Using this information, a compelling case to support an NDM needs to be established, which examines the benefits, costs and risks.

When looking at benefits, there should also be an appreciation of what success looks like, which takes on board the realities of the demand for services and potential income stream

available. When examining costs, the range of legal, technical, financial and procurement issues must be considered to prevent them from becoming barriers. And with risks, there should be some recognition that an NDM, akin to a commercial model, could fail, and so there must be an appreciation on what can be done to mitigate failure.

NDMs, if carefully planned for, can help manage a long-term programme of service delivery, which can help to support greater efficiency, more commercial focus and enables staff to develop their own solutions and greater innovation. Indeed, in order to unlock many of the benefits, some NDMs rely on greater staff engagement, potentially by including staff ownership.

In recent years, there have been many significant NDMs established that have brought about many benefits to public service delivery. One example of this is probation trust mutuals, which have transformed the way rehabilitation services are provided to offenders. Through these mutuals, private sector firms and some of Britain’s biggest and most successful rehabilitation charities have been brought together to create value. There are, of course, many other examples of significant NDMs, which provide case studies where lessons can be learnt.

The process of establishing an NDM is complex. However, with ongoing financial pressures on public bodies, there is a case for aiming to make more fundamental change, such as the adoption of an NDM, as opposed to seeking to respond to these financial pressures via incremental, piecemeal cost reduction.



Mark Williams, CIPFA Governments Faculty Board and SE Regional Council

**Why RE:FIT is an alternative for an energy efficient estate**

*By Mark Williams – Member – CIPFA Governments Faculty Board and SE Regional Council*

The government, in accordance with its strategy, is working to create an effective and efficient public sector estate, which also reduces environmental impact. The environmental focus is one of the key aspects of their agenda, but how can public bodies, with dwindling resources, best support this?

The government’s estate strategy is invariably influenced by the Paris climate agreement. As part of the agreement, the UK pledged to tackle greenhouse gas emissions, along with a plethora of other countries. The

estate strategy and government’s commitment to tackle climate change have led to many initiatives within the public sector. Although resources are tight, many of the initiatives are cost-effective and have the added bonus of helping public services save money.

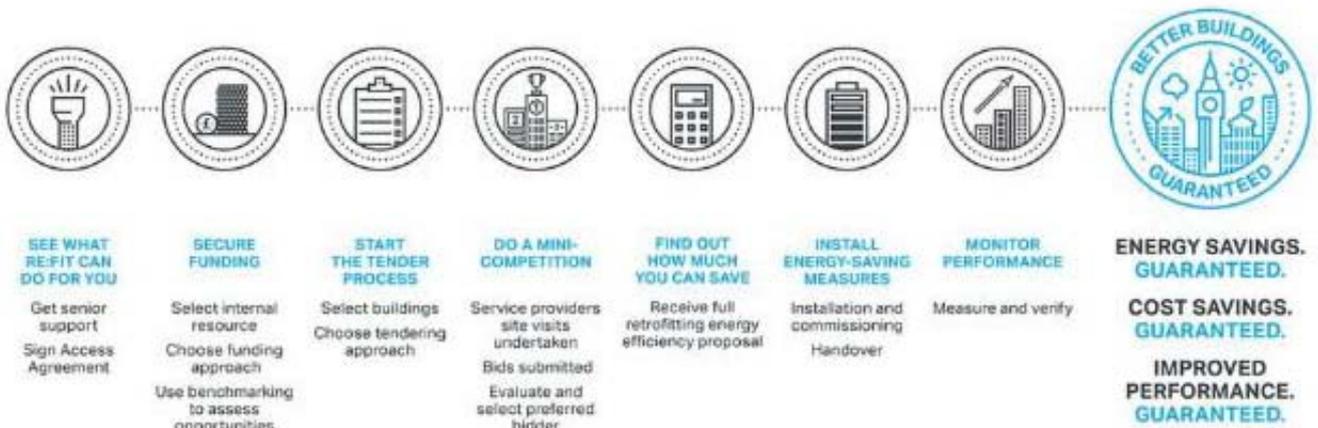
One example is RE:FIT, which is an energy performance contracting framework. It provides public bodies with an excellent opportunity to reduce their carbon footprint, generate financial savings, enhance asset management and potentially develop new income streams.

The Greater London Authority (GLA) and the Mayor of London introduced the RE:FIT model in 2008. The model

involves private providers working to make public buildings, including central government buildings, more energy efficient and guarantees energy savings and returns by lowering energy bills. See [www.london.gov.uk/what-we-do/environment/energy/energy-buildings/refit](http://www.london.gov.uk/what-we-do/environment/energy/energy-buildings/refit) for more information.

For the sake of future generations, all public servants have an opportunity to explore the best possible solutions to reduce their environmental impact. Although resources may be tight, it is an issue that cannot be ignored. And the RE:FIT model proves that there are cost-effective options available.

**RE:FIT LONDON – IT’S A SIMPLE SEVEN STEP PROCESS.**



## Public sector excellence awarded in a stellar evening

The best examples of public sector excellence in going digital were recently recognised in a gala evening. Over 250 guests attended the [Public Sector Paperless Awards](#) on 6 July 2017 in Kensington.

Mark Blanchard, Director at GovNewsDirect, opened the evening highlighting the importance of recognising the achievements of digital transformation and read a statement by the Right Honourable Caroline Nokes, MP, Parliamentary Under Secretary of State for the Cabinet Office and Lead Minister for GDS.

Blanchard says, “The inaugural Public Sector Paperless Awards has been a resounding success. We were

impressed by the high calibre of the entries received. The judges, chosen to represent a range of organisations and from various areas across the public sector, had a real challenge to choose a winner from the shortlisted projects. All the finalists were able to demonstrate a quantifiable difference made to people’s lives in addition to efficiency savings across the board. GovNewsDirect were thrilled to have been able to bring these examples of excellence together to celebrate their achievements.

“The judges chose the winners based on a comprehensive scoring system that included a variety of areas such as demonstrable examples of

improvement in customer service, value for money and cost savings, innovation and a clear strategy. Each of our winners provided real evidence of improving the lives of people they served. We are looking ahead to the Public Sector Paperless Awards 2018, with nominations opening on 1 September 2018.”

There was also a prize draw on the night that all attendees were entered into for a docking station and five smartpad clipboards by Wacom Business Solutions, which was won by Kent & Medway NHS and Social Care Partnership Trust.

The winners were:

Category	Winner	Project Name
<b>Management and Culture Project of the Year</b>	Barnsley Healthcare Federation CIC and Barnsley CCG	Shared Patient Records for Barnsley
<b>Process and Workflow Project of the Year</b>	West Yorkshire Police	Digital Policing Team
<b>Best Customer Experience</b>	Flagship Homes	Customer Platform
<b>Best Digital Document Management</b>	Edge Hill University	E-VAL: The Online Academic Quality Management System
<b>Most Flexible Digital System of the Year</b>	National Funding Scheme	DONATE
<b>Best Use of E-Forms</b>	Buckinghamshire County Council	Faux Digital to Full Digital the Story of the First QR Code Waste Permit
<b>Efficiency Savings Project of the Year</b>	Oxleas NHS Foundation Trust	Delivering Modern Communication Between NHS Organisations
<b>Paperlite Project of the Year</b>	Oxford University Hospitals NHS Foundation Trust	Implementation of a Fully Integrated Electronic Patient Record on an Intensive Care Unit
<b>Special Recognition Award</b>	Grant Oliver at Richmond General Practice Alliance	Grant Oliver Recognition
<b>Going Paperless Project of the Year</b>	Crown Prosecution Service	‘Digital Working in the Crown Court’ – DCS and Digital Service of IDPC

## How data could support your social care services

With social care finances under pressure and an increasing demand for social care services, local authorities are facing a great challenge to make their services sustainable. As shown in the case study below, our [Social Care Benchmarking clubs](#) support local authorities in the transformation and innovation of service delivery. How?

We provide the club members with the following:

- a reliable source of information: our unique datasets collate data on costs, processes, structure and activity of the service to measure the service performance
- focused club reports: these highlight areas of concern and where savings can be made
- networking opportunity: club members are facilitated to share information, procedure and ideas on how to improve the efficiency of their services.

### Case study: Nottinghamshire County Council

#### Why CIPFA?

The CIPFA benchmarking tool provides a reliable and credible source of data that can help us make informed decisions about making required efficiency savings across services for looked after children. The CIPFA tool enables us to compare our costs on a like for like basis (as far as possible) with other councils across the country. This is particularly useful to understand the costs of statistical neighbours of Nottinghamshire County Council who are also part of the Benchmarking club.

#### How did we help?

We have been part of the CIPFA Children Looked After Benchmarking club for the last few years. The data has helped us to understand our position and highlighted the need to compare data to add context to the decisions we need to make now and in the future. We know that this exercise requires a commitment of additional time and resources of operational staff and corporate support, but there is real value in the outcomes that this effort has produced.

#### Outcomes and lessons learned

One important outcome was the evidence that the actions we had taken to grow our internal fostering scheme

have been worthwhile and that we need to continue to strike a balance between providing a good and efficient internal fostering service and to get best value for money from placements we commission in the independent sector. It has also informed our work looking at how we could provide and commission children’s residential care services in future.

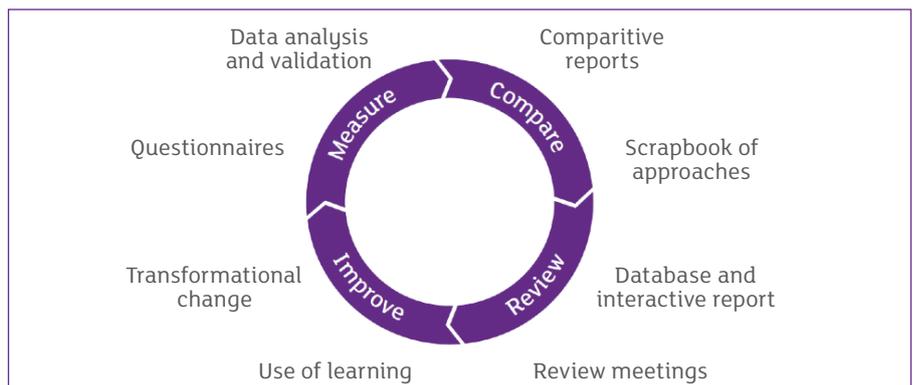
Another useful element of the service was the scrapbook feature. This allowed all those councils who were taking part to add additional narrative and valuable context to the results. It allows us to make sure we are talking about the right issues and gives us intelligence that we can use and trust. This ‘soft’ intelligence is just as useful as the ‘hard’ evidence that the financial data provides.

We have been able to present these figures to all stakeholders from senior management, to elected members and front line staff. This has helped us to generate a shared understanding across our services of the financial challenges we face and the direction of travel we are travelling in as an organisation to meet them.

To find more information about the clubs we offer, please visit [www.cipfa.org/services/benchmarking/social-care](http://www.cipfa.org/services/benchmarking/social-care).

“The benchmarking club offers members of the finance community the opportunity to compare, challenge and seek out solutions to a particularly demanding service sector.

It also offers likeminded individuals opportunity to work together and realise the challenges are not unique to only one authority.”



## Limited resources available to support health and social care integration

Due to the significant pressures on the sector, there is emerging evidence of limited resources available to support the integration of health and social care in Scotland, according to CIPFA's integration group, which is comprised of Scottish integration authority chief finance officers (CFOs).

In a submission made to the Scottish Parliament Health and Sport Committee, CIPFA's integration group claims that after the living wage and other fixed commitments, there is not enough funding available to power the integration of services in the long term. This resource issue is also intensified by the reduction of local authority and health settlements and the pressure on the sector to deliver savings.

The group recommends that in order to financially support the integration agenda, there needs to be a long-term financial strategy established by the Scottish Government. In planning for this, the government should also examine whether integrated authorities should receive a direct allocation of funding to maintain progress.

Commenting on the submission, Head of CIPFA Scotland, Don Peebles, said:

"The integration of health and social care services in Scotland will make a meaningful and lasting difference to the sector. Therefore, it is crucial that there is enough long-term investment to make sure services, which are facing significant pressures, can afford such transformation.

"It is illogical that there is no medium to long-term financial strategy for the integration of services in Scotland already in place. We urge the government to outline funding plans for future years to ensure outcomes can be boosted for the benefit of communities."

The Chair of the CIPFA Integration Joint Board (IJB) Chief Finance Officers Section, Sharon Wearing, said:

"With emerging evidence of current budget deficits of integrated authorities between 3% and 14%, there is a careful balance to be struck between the level of resources necessary to manage current demand while planning for system redesign.

"It is of crucial importance that there is integration, however, it needs to be properly planned for to ensure the sustainability of services."

## Institute matters

### Tom Sowerby Award 2017 for outstanding service to CIPFA students

Marilyn Clarke was taken entirely by surprise and awarded the Tom Sowerby Award for her commitment to CIPFA students over her 20 years working for CETC. The past president, Brian Roberts, delivered a beautiful speech that brought many a tear to our eyes as well as a standing ovation to our award winner. In true Marilyn style, we were treated to gracious smiles and an acceptance speech.

“We receive nominations for anyone who has given service to CIPFA students. In practice, this means that candidates are usually employers or mentors who are passionate about developing the next generation of CIPFA members, but this isn’t always the case.

“This year is one of those times. The winner is a person who has supported students for over 20 years, and has provided this help to literally hundreds of students. I think that just about everyone in this room has had some form of contact with our winner, usually solving a problem with a smile.

“This year’s winner is, for the first time in a long time, from CIPFA itself and is Marilyn Clarke.

“Marilyn has served students as part of the CETC team since she joined as a teenager over 20 years ago. During this time her entire working career has been dedicated to serving the needs of students as they study for the professional qualification, ensuring support both directly to the students and to the tutors and other CETC staff and partners who were delivering services to our students CIPFA training.

“Marilyn’s sole concern has been for the needs of the students and their employers. She has worked with employers to ensure that they too are able to offer their students the best possible support.

“She has recently moved to a new role in CIPFA, so it is entirely appropriate that we celebrate her contribution by awarding her this prize.”



Marilyn Clarke

### CIPFA’s Head of Fraud Rachael Tiffen wins Stella Walsh Award

Rachael Tiffen, Head of CIPFA’s Counter Fraud Centre, has won the Stella Walsh Award for Long Term Commitment to Preventing Fraud. Rachael was nominated by CIPFA for her tireless commitment to serving the wider counter fraud arena.

Rachael’s counter fraud career began 20 years ago, during which time she has consistently demonstrated an unwavering commitment to innovation and improving standards across the counter fraud profession.

She has since become a highly regarded and nationally respected counter fraud expert.

Rob Whiteman, CIPFA chief executive said: “I thoroughly agree that Rachael deserves this recognition, and all of us here at CIPFA are extremely proud of her for winning this award. Quite apart from the tremendous achievements she had before joining CIPFA, Rachael has been the mastermind behind our CIPFA Counter Fraud Centre and over the course of its first three years, she has created a diverse and innovative programme, which is now one of the lynchpins in the public sector’s fight against fraud and corruption.”

The Stella Walsh Award was presented to Rachael by the Fraud Women’s Network in July.



From left: Toni Sless, Chairwoman of the Fraud Women’s Network, Rachael Tiffen and Simon Dukes, Chief Executive of Cifas

## Help us to help you!

At CIPFA we are committed to doing things better. We help our customers spend public money wisely. Our unique insight gives you the means to deliver change. At CIPFA, the Business Development Team can help guide and support you in your needs as an individual and your organisation.

Public sector teams are changing – new skills are required, from strategic leadership to precise procurement. CIPFA’s Professional Qualification and training equip managers throughout public service with crucial skills. Our expert advice, guidance and wide range of carefully designed products and services offer essential support as you review and improve your business models and strategies to meet the challenges set by the government.

Two new members to the business development team are Dan West and Amie Hall. Based out of the North West CIPFA office, in Chester, they will be supporting clients across the Northern regions from Newcastle to Manchester, and Birmingham up to Scotland!

Supporting local government authorities and public sector organisations through the changes, enabling them to successfully re-shape public services while meeting new policy and legislative demands.

CIPFA provides a number of services to enable organisations to develop and individuals to keep up to date with relevant skills and knowledge.

These include:

### Financial Management (FM) Model

– online tool kit to transform the financial health of your organisation

Accounts Closedown – software system to save time, reduce costs and prepare accounts in line with the Code of Practice



PSIAS External Assessment – being able to review your audit function at least once every five years

Plus accredited training, in house training and training needs analysis options. Courses include contract management, finance business partnering and commerciality training, fraud risk management and public sector procurement but to name a few! You can find a full list of courses at: [www.cipfa.org/training/accredited-training](http://www.cipfa.org/training/accredited-training)

Amie Hall says “you want people who have a firm grip of the public sector. People you can trust to listen to your ideas. People who will develop the right solutions with you, and make a real difference.”

Our team of advisors can work with you with our specialist advisors to help:

- understand your current situation – and future needs and aspirations
- create innovative and practical solutions that work for you
- develop plans and support implementation
- build your capacity to manage future change.

The Business Development Team work closely with the CIPFA Networks, Regional Branch Councils and Regional Events Teams throughout the UK. They are happy to assist in providing events, sessions and training relevant to needs and to help individuals gain the best for their organisations.

To speak with Amie or Dan please contact them on the below details:

Amie Hall - 07824 839567  
[amie.hall@cipfa.org](mailto:amie.hall@cipfa.org)

Dan West - 07887 824610  
[dan.west@cipfa.org](mailto:dan.west@cipfa.org)

## CIPFA hosts delegation from the People's Republic of China

Rob Whiteman and Andrew Burns, CIPFA President, welcomed representatives from the Supervision and Inspection Bureau of Ministry of Finance of People's Republic of China on 24 July.

The Bureau is a key department within the Ministry of Finance responsible for overseeing internal control across all five tiers of government in China. The conversation focused on sharing information and best practice on implementing effective internal control.

It was a high powered group of individuals from the Supervision and Inspection Bureau who lead, supervise and enforce compliance with national regulations and laws, as well as investigating finance related legal infringements. There was a very positive exchange of information between both parties.

## Consultations Issued by CIPFA's Boards and Panels

The following consultations have been issued by CIPFA's Boards and Panels:

- CIPFA/LASAAC has issued its annual consultation on the 2018/19 *Code of Practice on Local Authority Accounting in the United Kingdom* – it focuses on amendments to the Code introduced by IFRS 9 *Financial Instruments*, IFRS 15 *Revenue from Contracts with Customers*, a number of narrow scope amendments to IFRS and other minor amendments. The consultation also seeks views on the approach to IFRS 16 *Leases* which is anticipated to apply to the 2019/20 Code – the consultation closes on 6 October 2012.
- In a parallel consultation CIPFA's Treasury and Capital Management Panel has issued a questionnaire to assess the impact of the adoption of IFRS 9 on General Fund balances – the consultation closes on 8 September 2017.
- CIPFA's Local Authority Accounting Panel has issued its consultation on the *Service Reporting Code of Practice Service Expenditure Analysis* featuring changes to the children's and education and public health services - the consultation closes on 15 September 2017.
- CIPFA's Treasury and Capital Management Panel will shortly be issuing its consultation on the changes to the Prudential and Treasury Management Codes.

## A new approach to fraud risk management in the social housing sector

Housing fraud is now widely recognised as a growing social problem that deprives legitimate and deserving tenants of access to affordable homes.

It manifests itself in a number of forms; from fraudulent right to buy or right to acquire schemes, to illegal subletting or the acquisition of housing tenancy agreements by dishonest means.

To help address the issue, CIPFA has worked with business assurance specialists TIAA to create detailed guidance on how to recognise and mitigate fraud risks.

The new guidance is specifically aimed at housing associations and registered social landlords. It forms part of CIPFA's Fraud Risk Wheel and covers key selling, application fraud, unlawful sub-letting, succession fraud and right to buy, showing users:

- how the different risks arise
- the steps or controls that can be put in place to mitigate them
- how similar organisations have dealt with the issues.

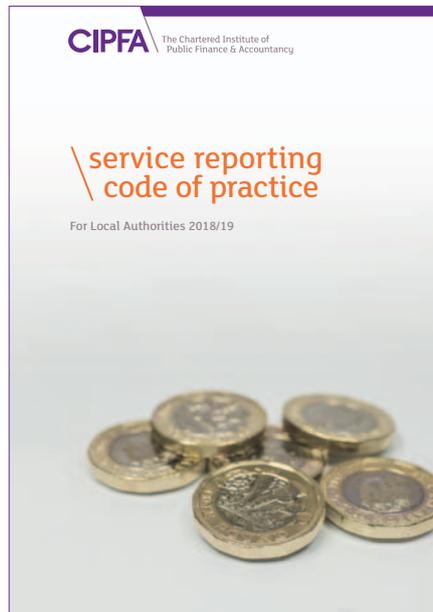
The Wheel also covers expenses fraud, procurement fraud, gifts and hospitality fraud and pensions fraud. For full details, visit: [www.cipfa.org/fraudriskwheel](http://www.cipfa.org/fraudriskwheel)

## Recent CIPFA publications



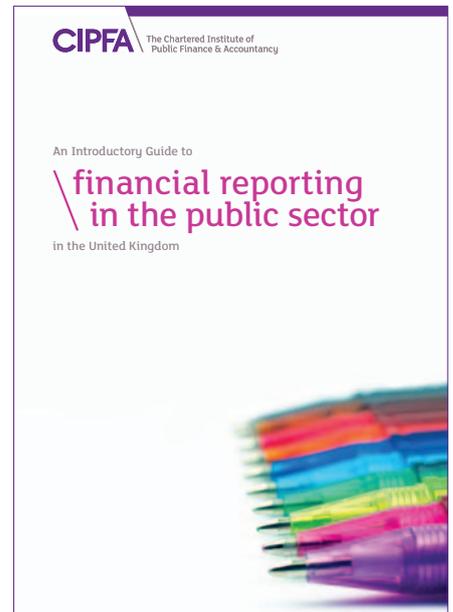
### Code of Practice on Local Authority Accounting in the United Kingdom: Disclosure Checklist for 2017/18 Accounts

If you are responsible for preparing or auditing local authority accounts to ensure that the requirements of the Code are met, this checklist will provide all the authoritative guidance you are looking for.



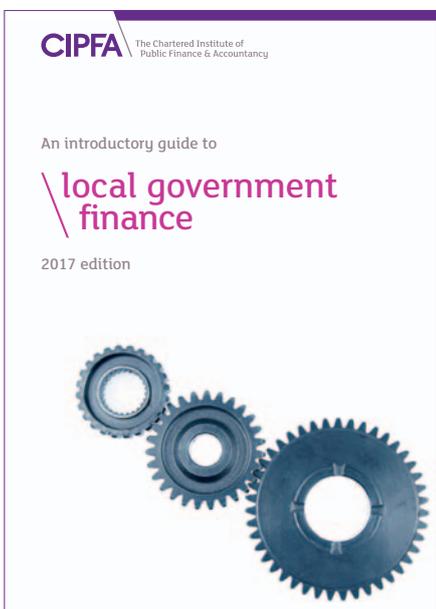
### Service Reporting Code of Practice for Local Authorities 2018/19

SeRCOP is prepared in accordance with the financial reporting framework established by the Code of Practice on Local Authority Accounting in the United Kingdom (the Code). It applies to all local authority services throughout the UK from 1 April 2018 for the preparation of 2018/19 budgets and performance indicators.



### An Introductory Guide to Financial Reporting in the Public Sector in the United Kingdom

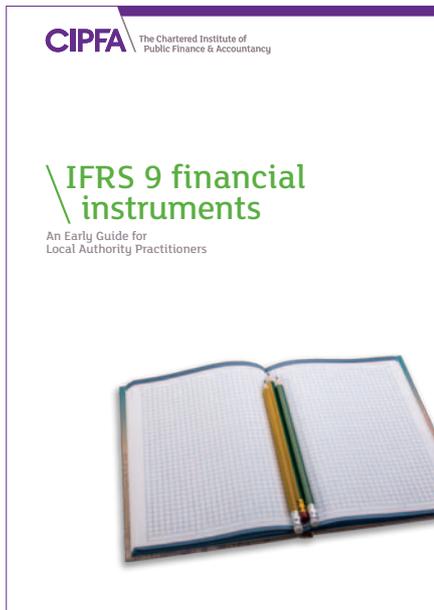
This publication sets out why financial reporting in the public sector matters, what form that financial reporting takes, how financial reporting in the public sector is developed and what confidence is provided by the information that is produced.



### An Introductory Guide to Local Government Finance (2017 Edition)

This updated guide is an essential introduction to local government finance for all those with an interest in public services. It is designed to be easy to read and give the reader the key information they need at their fingertips.

## Recent CIPFA publications



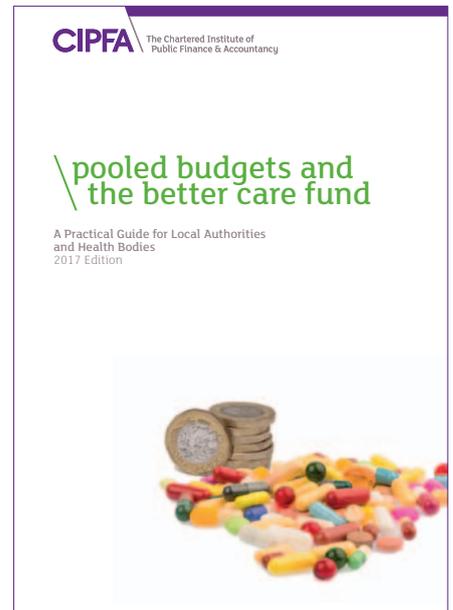
**IFRS 9 Financial Instruments:  
An Early Guide for Local Authority  
Practitioners**

This publication provides guidance on the application of financial instruments, including recognition, measurement, treatment of gains and losses, derecognition and presentation and disclosure in financial statements.



**Audit Committees: Practical  
Guidance for Local Authorities  
and Police (2017 Edition)**

This fully revised and updated edition takes into account the legislative changes and professional developments that have affected the sectors. It includes additional guidance and resources to support audit committee members, and those working with and supporting the committee's development.



**Pooled Budgets and the Better  
Care Fund: A Practical Guide for  
Local Authorities and Health Bodies  
(2017 Edition)**

This updated guide should be valuable reading for anyone responsible for implementing or reviewing pooled budget arrangements, or seeking to ensure that they offer good value for money to taxpayers and the local community.

# CIPFA-Penna Talent Spot

## Competing to Win in the Finance Talent War

As a Finance Lead in local government recruiting across both the interim and permanent market, I have noticed an increase in permanent opportunities within local government especially within the £50,000 to £60,000 salary range.

With a market place that has more opportunities than candidates it is therefore essential that an authority sets itself apart and becomes an employer of choice to attract the right talent. There isn't a simple answer, talent is obviously in the eye of the beholder and therefore what suits one organisation and role may be different for another. Candidates generally apply based on location and salary first, so if these are equal, then it is the intangibles that start to determine their choices – eg career prospects, brand and culture of the authority and their reputation. Authorities therefore need to ensure they have all things covered.

Quality candidates are also being lost to the commercial sector so it's essential that the public sector in general has a good employee value proposition to hang on to them! At CIPFA-Penna we work very hard to make the public sector appeal to candidates and we encourage candidates to speak to the

authority or recruiter involved to gain a full picture of the opportunity. But what if this isn't available – imagine how many prospective candidates may not even apply. So high candidate care during the process is essential.

If employers want to secure the right quality candidates, they must also be more receptive to the transfer of skills and qualifications from those working in the wider public sector and commercial sector. And as we advise many clients be prepared to develop someone to create the ideal candidate, your investment will pay off and having someone grow into the role is much better than an ongoing vacancy.

What remains key for any finance professional is having the appropriate experience, together with the qualifications (preferably CIPFA in most cases) and the right attitude. With public sector organisations continuing to transform, the increasing demand for an understanding of commerciality is high on the agenda.

So while the market is challenging you can win the war for talent if you broaden your horizons and think through the recruitment process from the point of view of a candidate who has lots of choice!



Philippa Watkins - Finance Lead, Local Government

## Members news

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### Welcome to new members

A warm welcome to our new members who have joined CIPFA in the past few months.

May we wish you a long and prosperous career. Don't forget that as a **CIPFA Member** you are a chartered public finance accountant and can use the designation **CPFA**.

**Brendan James Hodson**

Isle of Wight Council

**Zuned Yusuf**

Nottingham City Council

**Holly Patricia Reid**

Brighton and Sussex University  
Hospitals NHS Trust

**Lee Illingworth**

The Newcastle upon Tyne Hospitals  
NHS Foundation Trust

**Mathew Gotts**

Wirral Borough Council

**Mohammad Aftab Uddin**

CAO, Ministry of Health, CGA Bhaban

**Mitchell James Collins**

Grant Thornton UK LLP

**Lloyd Clark**

Portsmouth City Council

**James Norris**

The Royal Borough of Windsor and  
Maidenhead

**Lewis Gosling**

Oxfordshire County Council

**Laura Jane Davies**

West Sussex County Council

**Darren Revill**

Nottingham City Council

**Amelia Robinson**

Grant Thornton

**Jennifer Ann Batten**

Moore Stephens LLP

**Sonali Sharma**

University Hospital Southampton  
NHS Foundation Trust

**Rachel Mary Brewer**

Deutsche Bank

**Meija Ling**

London Borough of Merton

**Rachel Bishop**

NHS Improvement

**Rebecca Williams**

Leeds Teaching Hospitals NHS Trust

**Andrew Michael Good**

Lancashire County Council

**John Stanley Muller**

City of Cardiff Council

**Christina Smith**

Department for Education

**Jennifer Louise Hossain**

London Borough of Sutton

**Lee Drysdale**

Fife Council

**Mohammed Jalal**

London Borough of Waltham Forest

**Nicholas Joicey**

Civil Service

**Ellen Millington**

Grant Thornton UK LLP

**Grace Hawkins**

Grant Thornton UK LLP

**Sarah Rowena Johnson**

City of Bradford Metropolitan  
District Council

**Richard Kyei**

London Borough of Hounslow

**William Elliff**

North Bristol NHS Trust

**Steve Basey**

Home Office

**Gemma Griffiths**

Shropshire Council

**Kiresh Mavaei**

London Borough of Barking and Dagenham

**Fiona Kate Massie**

Aberdeenshire Council

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\*Terms and conditions apply to all benefits. See website for details. Offers subject to change without notice. Insurance is subject to underwriting. Motor Source Group – Proof of eligibility may be required. Discounts vary between makes and models. Forces Cars Direct T/A Motor Source Group is authorised and regulated by the Financial Conduct Authority (672273). They act as a credit broker not a lender. They can introduce you to a number of lenders who may be able to offer you finance facilities for your purchase. They will only introduce you to these lenders. Vauxhall Associate Partners – For full t&cs ([www.partnersprogramme.co.uk/terms-and-conditions](http://www.partnersprogramme.co.uk/terms-and-conditions)). When you join Partners you may be contacted by Vauxhall, you can opt out: <https://www.partnersprogramme.co.uk/contact> Cornmarket Insurance – Click here for full terms and conditions. The 92% saving shown is based on affinity groups schemes currently run by Cornmarket and your affinity group may experience a different saving level. CIPFA Rewards is managed on behalf of CIPFA by Parliament Hill Ltd of 3rd Floor, 127 Cheapside, London, EC2V 6BT who are authorised and regulated by the Financial Conduct Authority for non-investment insurance mediation only under registration number 308448. Details can be checked on the Financial Services register by visiting the FCA's website at <https://fca.org.uk/register>.

## Volunteer Opportunities

### HEART UK seeks treasurer trustee

HEART UK, the Cholesterol Charity is a national charity providing expert support, education and influence around all blood fats and in particular high cholesterol. Our services are provided to patients, their families, health care professionals, the media and also key opinion leaders in the health sphere.

We are a truly inspiring charity and a tremendously rewarding cause. We have great impact on individuals and families, but there is still much to do. Help us save more lives and keep more families together by becoming a treasurer trustee to oversee our finances and risks. The day to day finances are looked after by an outsourced firm of accountants.

### Our vision

No premature deaths or suffering caused by cholesterol and/or cardiovascular disease.

### Our aim

For UK adults to know and understand their cholesterol levels and take appropriate action.

### The size of the problem

More than 50% of the UK population is estimated to have high cholesterol.

More than 200,000 people (including around 28,000 children) have an inherited form of high cholesterol, which means they are at high risk of an early heart attack or stroke, as early as their 40s, or 50s. This could even be in their teenage years in more complicated cases. As many as 93% of these cases remain unidentified.

As mentioned, we cover other blood fats, but these conditions are not as common.

## Calling All Members...

Please go on to [MyCIPFA](#).

Check your contact details are up to date. Please also include additional information (if you have not already done so) such as your date of birth, phone number and the sector you work in. And also update your email preferences.

If you want TO speak to a colleague about your membership, please contact us on +44 (0)20 7543 5600 or at [membership@cipfa.org](mailto:membership@cipfa.org).



### Disciplinary Scheme seeks CIPFA members to provide expert advice

CIPFA is seeking to add to its pool of CIPFA members who may be called upon to provide expert advice in disciplinary cases. Experts are required to investigate members' conduct, provide advice on technical accountancy issues and express an opinion on whether individuals have complied with professional standards.

Candidates must have substantial experience at either: (1) director of finance level in NHS organisations or local government; or (2) senior external or internal audit level. Candidates will need to demonstrate sound judgment, independent thinking and a willingness to bring their professional experience to bear on issues that might affect the livelihood of fellow professionals. Excellent analytical skills, the ability to write clear, concise reports within a strict timetable and the ability to give an authoritative opinion in public hearings are also essential. This would ideally suit recently retired individuals or consultants.

Successful candidates will be appointed on a consultancy basis as and when matched to the expertise required in individual cases and following an assurance of independence/freedom from conflict of interest.

Expressions of interest or any questions about this opportunity should be addressed to [dsadmin@cipfa.org](mailto:dsadmin@cipfa.org).

### Action under CIPFA's Disciplinary Scheme

The Institute's independent regulatory committees have taken the following actions in relation to an Institute member/former member:

*Mr Shahid Naseeb Ahmed*

After a hearing held on 5 June 2017, a Disciplinary Committee determined to expel former member Mr Ahmed from the Institute in respect of his having been convicted of three criminal counts relating to VAT fraud and his being sentenced to a total of 15 months' imprisonment.

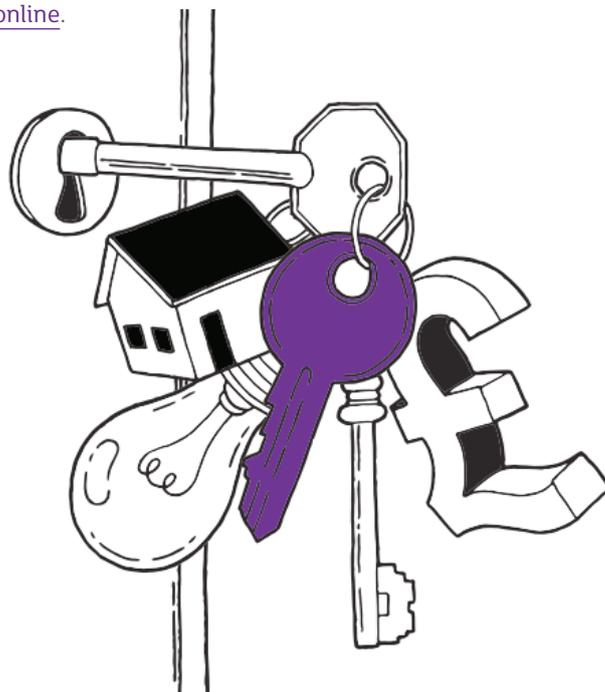
The fraud, which concerned the Merchants Hotel business in Manchester, took place over the period January 2009 to October 2013 and involved Mr Ahmed filing false returns and creating and using false invoices. Losses to HMRC were assessed as amounting to £80,000.

As Mr Ahmed is a former member he can only seek re-admittance under the terms of the disciplinary regulations. Fuller details can be seen [online](#).

### TISonline Fraud discussion forum

The [TISonline Fraud discussion forum](#) allows you to ask questions, raise issues, exchange information and invite opinion from a broad practitioner network of many thousands of registered users.

For guidance on how to use these discussion forums please read [How to use discussion forums](#) and [posting policy](#). You can also [sign up](#) to emails which alert you to when messages are posted and a daily summary.



## Regional news

### CIPFA Republic of Ireland CPD events – new General Data Protection Regulations

Following a very popular session in May, our Dublin CPD events continued with two equally successful talks held in City Hall, during June and July.

Despite the untypically humid weather, attendees turned out in good numbers to learn more about both General Data Protection Regulation (GDPR) and the Code of Practice for the Governance of State Bodies 2016.

On the former topic, data protection issues affect many professionals and not only those working in IT or systems. Public sector accountants and auditors often handle the most sensitive data. Control environments have changed such that we must be consistently mindful of the danger of email in terms of ready transmission and heightened risk by way of external leaks.

For those of us involved in audit, issues at times with dedicated virtual private networks (VPNs) or other portals can compound matters, especially where unsolicited client email transmissions of sensitive data occur in lieu. This may be further impacted where the root problem of technology difficulties is a false economy of inadequate budget or resources. We would urge all members to continue to avail themselves of the most up to date encryption available on email attachment transmissions and to dissuade clients from choosing the convenience of email over usage of more secure portals, where any sensitive data is exchanged.

On data elsewhere, we may witness issues with legacy databases in terms of management and particularly where original designers move on or there is discontinued IT support on systems that are not say Oracle or SQL server based and the question we need to be asking is whether such systems are adequately flagged on risk registers



Aileen Hughes, Chair, CIPFA Republic of Ireland and Internal Controls Analyst, ESB Group

and data is cleansed in a sufficiently timely manner. On a more worrying trend, we have witnessed attempts at covert information extractions from unsuspecting civil and public servants by way of social engineering and deception and typically by private investigators probing pressurised public offices.

The principles of the existing Data Protection Act to which we are obliged are that data must be obtained and processed fairly and for specific purpose only. We must safeguard data within our possession and ensure that we retain neither irrelevant nor excessive data nor information for longer than necessary.

While we typically need explicit consent to process sensitive data, many public entities may have entitlement under statutory function and we would also urge local members to familiarise themselves with *Government Circulars 12/2016 Licence for Re-Use of Public Sector Information* and *17/2012 Data Sharing in the Public Service*.

New GDPR legislation requires mandatory notifications of data breaches within 72 hours, which law becomes enforceable in June 2018.

Penalties by the data protection commissioner may be up to €20m (or 4% of total annual turnover from preceding financial year) so potentially material sums that may require disclosure in financial statements.

Revised law is effectively a move towards data subjects having more control over personal data, imposition of direct statutory obligations on data processors and a new concept of accountability with a requirement to demonstrate compliance.

In conclusion, as accountants and auditors, we must take continued care while handling personal data. We need to take note of GDPR law and the enforcement date of June 2018 and prepare now.

We need to highlight potential implications and significance of fines, false economies where avoiding IT/administration spend now may result in higher outflows later. Auditors may ultimately need to consider querying breach levels and accruals for fines and impact where any on financial statements by way of disclosures.

## Health & social care conference 21 September

The election may have led to uncertainty, but the key issues facing health and social care are definite enough: how to make the finances sustainable for the long term; how to achieve the shifts towards prevention on which such a long-term position will depend; how to reach an equitable balance between public and private funding of social care; how to turn place-based integration – combined with devolution - from everyone's good idea to the driver of transformation in practice.

Recent problems across the health and social care system have, however, encouraged emergency responses rather than ensuring a healthy regimen to deal with those issues. The 2017 Health & Social Care Conference will set out the challenges and then move on to focus on the ideas which might make a difference. The programme, which is just being finalised, will include:

- Richard Humphries (King's Fund) will set out the trends and challenges and chair the day
- an update on how Greater Manchester's public, private and third sector organisations have come together to identify solutions to improving health outcomes, from Grant Thornton

- relevant experts will explore the promising new approach of making 'social prescribing' available to GPs
- case studies on integration in practice, including learning on joining up nursing and residential home procurement across health and social care in Wales
- a panel of experts will discuss how to get the best out of STPs as the planning basis for the changes needed, and respond to your questions
- Michael Brodie (Finance and Commercial Director of Public Health England) will explain and launch new guidance, co-produced by PHE and CIPFA, on how to evaluate the impact of long term revenue investments such as health prevention.

The conference is primarily aimed at finance managers, accountants and auditors involved in health and social care, but will also interest policy analysts and general managers involved in those areas.

[Book now.](#)

## CIPFA Cymru-Wales Branch Executive – co-opted members

The Branch Executive is pleased to announce that we have recently added two new co-opted members: Simon Cookson, who is the Audit and Assurance Director at NHS Wales Shared Services Partnership and Dewi Morgan, Senior Manager at Gwynedd County Council.

There remain two possible vacancies for co-opted members and the branch would like to hear from anyone who would be interested in joining us. We meet four or five times a year (with video conferencing facilities available). This is a great opportunity to take a lead in what CIPFA is trying to do in Wales, and enables you to meet with fellow CIPFA professionals from within Wales and further abroad. In particular, members working in the NHS, housing or the voluntary sector would add a further dimension to our work.

If you would like to discuss this further, please email our President, Rhian Evans at [rhian.evans@wrexham.gov.uk](mailto:rhian.evans@wrexham.gov.uk) or [president.cymruwales@cipfa.org](mailto:president.cymruwales@cipfa.org)

**CIPFA North East leads the way at the North East Accountancy Awards**

Another glittering night was in store as over 400 North East finance people headed for the Hilton Gateshead in June to celebrate the North East Accountancy Awards. The Awards recognise excellence within the fields of finance, accounting and tax from all industry sectors operating in the North East. Whether from an accountancy firm, a local business, a service provider, a public sector organisation, nominees. Sponsor, judge, local finance teams or individuals all were in attendance.

Award-winning presenter Nadine Dereza, best known for her work with BBC, CNN and Financial Times, was our host for the evening and took to the stage to welcome all guests and took the opportunity to talk about the strength of the North East economy, commending the achievements of the finalists in attendance

Once again CIPFA North East was prominent as both a continued sponsor of the event and in particular the ‘public services finance team of the year’ and provider of 6 judges in the 13 categories.

The finalists in our award category were

- Tyne and Wear Archives and Museums
- NAO Agricultural Funds Finance Audit Team, and
- NHS Business Services Authority Financial Control Team

The judges unanimously selected the Tyne and Wear Archives and Museum Finance team as this year’s winners.



Tyne and Wear Archives and Museum Finance team with George Clark

The head judge George Clark – Past president of CIPFA North East and his team felt that they were a team who have worked hard to transform their organisation by reducing reliance on public funding to create a more commercially viable organisation. They showed an impressive awareness of the environment in which they are operating and offered great examples of innovative ways of working, leading to both national and international recognition. The team show dedication and commitment which has cemented them as an integral part of their organisation.

The award was well deserved and congratulation go to both them and all the other category winners on what was a spectacular showcase for the North East Accountancy family.

The award was presented by George Clark who was substituting for current regional chair Judith Savage who was only days from having her first baby (as a postscript Judith gave birth to a lovely son George and both are doing well, congratulations to you Judith)

## CIPFA North West – Pre-National Conference Event and Regions Stand

Following the success of last year’s national conference in Manchester, the event once again returned to the city. And as with last year the North West Regional Council held a pre-conference event for local members and members from other regions who travelled early for the main event. The event was well attended and included speakers from a wide range of backgrounds across the public sector representing the breadth and diversity of our local membership and NW Council.

The day started with a thought provoking interactive presentation from Superintendent Ian Whitehead and Sergeant Andy Doran. They explained the approach to systems thinking they had been employing across Lancashire Police in the last year and the significant impact that this had in re-thinking how they provide their call centre and multi-agency hub services across the county. They were followed by Alison Mckenzie-Folan from Wigan Council who outlined the council’s digital strategy and the impact it was having in helping the council and partners redesign their offering to the public.

The third speakers of the day were the partnership of Steve Coffey, Chief Executive of Liverpool Mutual Housing (LMH) and Kate Shone from ComMutual the charitable arm of the LMH group. Between them they set out some of the fantastic things LMH is doing to engage and change the communities within which they work.

A series of videos highlighted the work taking place and the difference being made in local communities.



Andy Doran and Ian Whitehead, Lancashire Constabulary – explaining Systems Thinking Approach



Alison Mckenzie-Folan, Wigan Council, Wigan’s Digital Strategy

The afternoon session was focussed on the Greater Manchester Health and Social Care Integration agenda and we were delighted to welcome Jon Rouse who talked the delegates through the history and challenges faced in the partnership. He outlined the complexity of the partnership arrangements and the progress being made on a range of fronts. Finally the day was completed by Nicola Chapman from CIPFA who did a tailored presentation of the year on the apprenticeship levy – managing to squeeze the highlights into nine minutes as the meeting room needed to be made available for the CIPFA AGM.



Mike Thomas Regional President is pictured below welcoming the National Conference and offering a vote of thanks and welcome to Andy Burns and the new presidential team



Susie Bamford from Manchester City Council seen receiving her prize from Naomi Jackson CIPFA Student President for the North West

## Student news

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### CIPFA Student Conference 2017

*Tony Era, Financial Audit Team Leader at Wales Audit Office and CIPFA member reports on this year's CIPFA Student Conference*

2017 saw a return to the fantastic city of Manchester for the annual CIPFA conference at which a whole day is dedicated to students and attendance is free of charge. This is a unique and fantastic opportunity to meet many different people from all walks of life and at many stages in their careers.

It was my second year as an attendee due to my volunteering with the CIPFA Student Network (CSN). Although I am a fully qualified member of CIPFA, I still personally feel a strong sense of duty towards all PQ students, both in the workplace (across a variety of institutes) and in the wider CIPFA world. While my enthusiasm remains high and I still feel I am able to offer useful support I will continue volunteering with CSN.

The conference began with a few sessions for all attendees and we were welcomed by the new President of CIPFA Andrew Burns. Andrew welcomed one and all, and set out his vision and priorities for his year of presidency. It was a truly inspiring welcome from someone who I personally met at the very first CIPFA event I attended in 2013, and who is always a passionate speaker and advocate for CIPFA.

Next up was a panel session by three of the most interesting and engaging speakers I have ever seen. Andrew Lilico, Philip Collins and Grace Blakely spoke so passionately and frankly about the current political and economic climate.

With my head swimming with new ideas, I headed over to the main

exhibition centre for a quick spot of networking on the way to the student conference. It was particularly nerve wracking because up to this point we did not know how many students were at the event but slowly and surely our room started to fill up and we had a great audience.

Kathryn Long, President of CSN welcomed everyone and the day was filled with thought provoking and engaging sessions from a wide variety of speakers. Of particular interest was the senior manager stories. These sessions are becoming more and more common and I always find them interesting, especially finding out how so many of us are accidental accountants! It truly shows the breadth and quality of the qualification and that it can open up so many pathways.

The conference was closed with a handover ceremony to the new President of CSN Chris Roberts. We all wish Chris the very best for his year which will surely include some big changes. The day was capped off with the annual prize awards for students and it was so rewarding and pleasing to see the celebrations after what I know were many months and even years of hard work.

If I might leave you with one thought it is to really encourage you to get involved with one of the many CIPFA volunteer groups. For me it has given me so many opportunities and it really does provide long lasting friendship and development.

CIPFA students and members wishing to get involved in the work of the CIPFA Student Network are invited to contact [csn@cipfa.org](mailto:csn@cipfa.org).



Tony Era, Financial Audit Team Leader at Wales Audit Office

**Students take the stage at CIPFA's Annual Student Conference**

Part of CIPFA's regular calendar of events is the Annual Student Conference, taking place last month at Manchester as part of CIPFA's wider Annual Conference.

CIPFA students were out in full force, where one of the highlights is the annual prize giving for those students whose exam results reflect the best performance in specific modules of the CIPFA Professional Accountancy Qualification (CIPFA PQ).

Friends and family of the winners were also invited by CIPFA to help celebrate the students' achievements. Congratulations to all the winners below, particularly Tess Barker of Grant Thornton who picked up a total of five awards in this year's ceremony.

**Arthur Collins Memorial Medal (Best overall in SCS and SPF)**

Tess Barker, Grant Thornton UK LLP

**Richard Emmott Memorial Prize (Best performance in SCS)**

Tess Barker, Grant Thornton UK LLP

**Eric Gilliland Memorial Prize in SPF (Best performance in SPF)**

Tess Barker, Grant Thornton UK LLP

**Best performance in FA**

Laura Tymon, Kingsbridge Academy

**Best performance in MA**

Jeremy Williams, Ministry of Defence

**Best performance in CFR**

Katherine Sissons, London Borough of Islington

**Best performance in AA**

Sarah Heasley, NHS Leadership Academy

**Best performance in FM**

Collins Mitchell, Grant Thornton UK LLP

**Best performance in FM**

Laura McHugh, Northern Ireland Audit Office

**Best performance in BCM**

Billie Emery, Wandsworth Borough Council

**Best performance in SPD**

Linda Major, Self-funding

**Best performance in TAX**

Jason Gooch, Nottinghamshire County Council

**Best performance in CGL & PSFR**

Nicola Jayne Owen, Isle of Anglesey County Council

**Best performance in CGL**

Callum Justice, City of Edinburgh Council

**Best performance in APA, Jessica Hambley**

Grant Thornton UK LLP

**Best performance in APA**

Hiruni Weerasekera, Grant Thornton UK LLP

**CIPFA International Student of the Year 2016**

Batdolgor Chuluun



CIPFA student prize winners

# Events

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## Conferences

### CONFERENCES

CIPFA's public sector conferences address the very latest and future developments in public financial management, audit, governance, housing finance, academies and more. Thought leaders, sector specialists, commentators and finance professionals across the public services tackle the issues of the day and provide best practice, case studies and keen insight in England, Scotland, Wales and Northern Ireland.

[Visit the latest conferences and events](#)

### THE BIG BREXIT BREAKFAST NORTH EAST EVENT

*19 September, Newcastle-upon-Tyne*

On 19 September, CIPFA and the Brexit Advisory Commission are hosting a unique breakfast session which will explore the risks and opportunities of Brexit for public services in the North East.

[www.cipfa.org/training/c/cipfas-big-brexit-north-east-event-20170919-north-east](http://www.cipfa.org/training/c/cipfas-big-brexit-north-east-event-20170919-north-east)

### NORTHERN IRELAND CONFERENCE

*5–6 October, Belfast*

The CIPFA Northern Ireland conference is available to book with or without accommodation on the night of October 5. To add accommodation onto your event please add the cost on the second page of booking.

[www.cipfa.org/training/cipfa-northern-ireland-annual-conference](http://www.cipfa.org/training/cipfa-northern-ireland-annual-conference)

### CIPFA / HFMA HEALTH AND SOCIAL CARE CONFERENCE

*21 September, London*

The 2017 Health and Social Care Conference with HFMA sets out the challenges and then moves on to focus on some of the matters that need to be tackled, and the ideas that might make a difference.

[www.cipfa.org/training/c/cipfa-health-and-social-care-conference-2017-20170921-london](http://www.cipfa.org/training/c/cipfa-health-and-social-care-conference-2017-20170921-london)

### INSURANCE SUMMIT 2017 KEEPING YOUR INSURANCE ARRANGEMENTS COMPLIANT AND COMPETITIVE

*21 September, London*

The CIPFA Insurance Network invites you to attend its Annual Summit 2017, which will cover the latest in strategic insurance opportunities and challenges.

[www.cipfa.org/training/i/insurance-summit-2017-keeping-your-insurance-arrangements-compliant-and-competitive-20170921-london](http://www.cipfa.org/training/i/insurance-summit-2017-keeping-your-insurance-arrangements-compliant-and-competitive-20170921-london)

### TREASURY MANAGEMENT NETWORK CONFERENCE

*1 November, London*

The CIPFA Treasury Management Network and the Treasury and Capital Management Panel are delighted to welcome delegates to join us at this year's conference.

[www.cipfa.org/training/t/treasury-management-conference-2017-20171101](http://www.cipfa.org/training/t/treasury-management-conference-2017-20171101)

### INVESTMENT INSIGHTS IN A CHANGING WORLD

*26 September, London*

CIPFA has teamed up with MSCI, a leading provider of research-driven insights and tools for institutional investors, to provide LGPS officers and members with an educational one-day investment strategies and market trends conference.

[www.cipfa.org/training/i/investment-insights-in-a-changing-world-20170926-london](http://www.cipfa.org/training/i/investment-insights-in-a-changing-world-20170926-london)

## Coming soon

### CIPFA HOUSING CONFERENCE

*26 September, London*

CIPFA's Annual Housing Conference comes at a time when the housing crisis is forever deepening and is the first opportunity post-election and post-Greenfell to consider the changing landscape for local authority housing.

[www.cipfa.org/training/c/cipfa-housing-conference-20170622-london](http://www.cipfa.org/training/c/cipfa-housing-conference-20170622-london)

### CIPFA LOCAL GOVERNMENT ACCOUNTING CONFERENCES

*15 November (Leeds); 22 November (London)*

### CIPFA PENSIONS CONFERENCE

*22nd November (London)*

### REVENUES TAKING STOCK

*20 September, Solihull*

The programme for this event covers issues of which local authority revenues practitioners need to be aware.

[www.cipfa.org/training/r/revenues-taking-stock-20170920-birmingham](http://www.cipfa.org/training/r/revenues-taking-stock-20170920-birmingham)

### INTRODUCTION TO PUBLIC SECTOR TREASURY MANAGEMENT

*20 September, Manchester*

This special one day event is designed to help you gain an understanding of the core themes of treasury and capital finance.

[www.cipfa.org/training/i/introduction-to-public-sector-treasury-management-20170920-manchester](http://www.cipfa.org/training/i/introduction-to-public-sector-treasury-management-20170920-manchester)

### DEVELOPMENT DAY FOR POLICE AUDIT COMMITTEE MEMBERS

*21 September, York*

These annual CIPFA events, held by CIPFA's Better Governance Forum and Police and Fire Network, provide the latest developments for police audit committee members, including strategic policing issues and emerging developments in governance and audit.

[www.cipfa.org/training/d/development-day-for-police-audit-committee-members-20170921-york](http://www.cipfa.org/training/d/development-day-for-police-audit-committee-members-20170921-york)

### INHOUSE FINANCE BUSINESS PARTNERING

*28 September, Wrexham*

This CIPFA qualification offers a unique blend of online and classroom-based training as well as providing refresher guidance on some of the technical/professional skills required of a finance business partner.

[www.cipfa.org/training/f/finance-business-partnering-20170928](http://www.cipfa.org/training/f/finance-business-partnering-20170928)

**CIPFA IN THE NORTH WEST NORTHERN SECTION AUTUMN SEMINAR**

*29 September, Kendal*

The Northern Section's Autumn Seminar returns to the Castle Green Hotel in Kendal on Friday 29 September.

[www.cipfa.org/training/c/cipfa-in-the-north-west-northern-section-autumn-seminar-20170929](http://www.cipfa.org/training/c/cipfa-in-the-north-west-northern-section-autumn-seminar-20170929)

**Training**

**COMMERCIAL MINI MBA**

With one course already fully booked, our popular Commercial Mini MBA caters to the need for a commercial approach to planning, designing and delivering services while retaining a public sector ethos.

[Check for available course dates](#)

**FINANCE BUSINESS PARTNERING**

The finance business partner is a critical role, enabling organisational transformation to meet upcoming challenges. CIPFA is delighted to be able to support this approach and to develop the different skill sets and approaches required to operate effectively as a finance business partner (FBP) through this new qualification.

[Check for available course dates](#)

**THE WELLBEING OF FUTURE GENERATIONS ACT AND YOU**

*7 September, Cardiff*

An interactive CPD session aimed at CIPFA practitioners across Wales. A 90-minute masterclass will consider the Well-being of Future Generations Act from a number of perspectives, including how practice is developing across the nation to meet the objectives of this world-leading legislation. Following the Masterclass, breakout sessions will explore "what does this mean for me?" from the perspective of the five ways of working: integration, collaboration, long-term, prevention and involvement.

[www.cipfa.org/training/t/the-wellbeing-of-future-generations-act-and-you-20170907](http://www.cipfa.org/training/t/the-wellbeing-of-future-generations-act-and-you-20170907)

**Regional Events**

**Northern Ireland branch events**

**EFFECTIVE AUDIT COMMITTEE**

*24 October 2017, Belfast*

It will include an overview of the overall control environment (and how audit committees play their part in this), how to review the effectiveness of risk management and how to work with internal and external audit to get the best out of them.

[www.cipfa.org/training/e/effective-audit-committee-20170414-northern-ireland](http://www.cipfa.org/training/e/effective-audit-committee-20170414-northern-ireland)

**FINANCE FOR NON-FINANCE MANAGERS**

*8 November, Belfast*

A practical, simplified one-day course aimed at public sector budget managers who haven't had formal finance training.

[www.cipfa.org/training/f/finance-for-non-finance-managers-20171108-northern-ireland](http://www.cipfa.org/training/f/finance-for-non-finance-managers-20171108-northern-ireland)

**CHAIRING SKILLS FOR EFFECTIVE MEETINGS**

*1 December, Belfast*

This interactive and practical course is aimed at chairs, aspiring chairs, board and committee members as well as senior executives who wish to develop their chairing skills and make meetings and their broader role more effective.

[www.cipfa.org/training/c/chairing-skills-for-effective-meetings-20170606](http://www.cipfa.org/training/c/chairing-skills-for-effective-meetings-20170606)



# Who's who at CIPFA

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Use this mini-directory to find the right people to contact at CIPFA about a specific area of our work.

Where no direct line is provided, call our contact centre on 020 7543 5600 and ask for the relevant person.

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