

# Spreadsheet

CIPFA.ORG | NEWS FOR MEMBERS AND STUDENTS

JANUARY 2017



Cabinet Secretary for Finance addresses

## CIPFA Wales Conference

Call to protect funding post Brexit

Wales Cabinet Secretary for Finance Mark Drakeford

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CIPFA

# Message from the President

January is not only a period to recover from the indulgences of Christmas, but it is also a time when we reflect on the year before. And as we look back at 2016 and the journey the Institute went on, it emphasises to me how you, as CIPFA members, have been at the backbone of all of our successes.

One of the key ways that you have helped the Institute is your input at our regional events. Towards the end of last year I had the pleasure of attending CIPFA Wales' and CIPFA's Northern Ireland's annual conferences, where I had the opportunity to once again see how vital your support is. Indeed, both events were a huge success and had many people in attendance. And this was due significantly to members promoting the conferences and helping out on the day.

It was also a pleasure to hear from key decision makers at each conference – Mark Drakeford AM, Cabinet Secretary for Finance and Local Government, at CIPFA Wales' and Máirtín Ó Muilleoir MLA, Finance Minister, at CIPFA Northern Ireland's. Both shared their latest insight on how they plan to ease the burden

of additional pressures on public services, which delegates took a lot from.

As well as attending regional events, I have represented CIPFA in Romania, South Africa, Brazil and Belgium. It goes without saying that the end of last year was a very busy period! During each visit, there was strong awareness of the CIPFA brand and its work to boost best practice in public financial management.

I was particularly delighted to see how well regarded our Institute is by the new president of the International Federation of Accountants (IFAC), Rachel Grimes, at its board meeting in Sao Paolo, Brazil. CIPFA, with Rob Whiteman, Ian Carruthers and Janet Senior all on various IFAC boards, has significant influence, giving us the optimum platform to really make a global difference to public finance. A contribution that is hugely important given that we face greater uncertainty and upheaval.

I'd like to take this opportunity to remind you all that although we are at the beginning of what could be a challenging year for public finances, the Institute is here to support you

so that you can continue to transform services and add value.

I wish you all a happy and prosperous New Year!



**Brian Roberts,  
President**



Rachel Grimes, President of IFAC, and Brian Roberts, CIPFA President at an IFAC board meeting in Sao Paolo

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## CIPFA Comment: Autumn Statement 2016

Rob Whiteman, Chief Executive of CIPFA said: “This was always going to be an Autumn Statement that left the chancellor with little wriggle room and there were no surprises in OBR’s projections that were announced.

“As a result it is no surprise that current departmental spending reductions remain in place. The fact that the UK’s productivity lags so worryingly far behind other G8 economies was the understandable driver behind much of what followed.

“CIPFA welcomes the major boost to economically productive infrastructure investment, the confirmed city deals, the new flexibility for mayoral combined authorities’ borrowing,

which CIPFA has long advocated, and more generally, the move to have one significant chancellor’s statement on tax on spending, rather than the two-a-year at present.

“However, the Autumn Statement was conspicuous for what it left out. CIPFA remains extremely concerned by the lack of commitment for social care, social housing and support for ‘Broken Britain’s’ areas of high need, which are in danger of missing out on the benefits to city deals and devolution.

“Hopefully the chancellor will take the opportunity of the Local Government Settlement to address the pressing need to support social care through the precept.”



Chief Executive of CIPFA, Rob Whiteman

## FEE becomes Accountancy Europe

The Federation of European Accountants (FEE) reached its 30th anniversary on 7 December 2016. It’s a time for setting out the future, with a new name, a new look, a new website, but most of all, a new philosophy: ‘Because people count’.

FEE plays a number of roles – it is a critical source of advice for politicians; a think-tank with events and publications; an advocate for its members; the voice of the accountancy profession, and – most importantly – working in the public interest for the benefit of society as a whole.

This new outward-looking philosophy is nowhere more important than in the public sector. CIPFA has been a consistent supporter of the FEE Public Sector Group (PSG). Alan Edwards, CIPFA’s Development Chair, is deputy Chair of the group. “FEE PSG has been at the forefront of the debate about stronger public financial management

(PFM) in Europe after the sovereign debt crisis. We have provided the ‘go to’ roundtable events for Europe’s debate on accrual accounting and harmonised standards.”

In particular FEE PSG has been a key contributor to discussions about EPSAS (European Public Sector Accounting Standards).

After 30 years FEE is changing its name to ‘Accountancy Europe’ complete with a new logo – a simplified letter ‘A’, crowned with a point. The ‘A’ refers to the accountants, auditors and advisors it represents. It goes a long way to fulfilling FEE CEO Olivier Boutellis-Taft’s stated aim for the rebranding: “Simpler, broader, more outward-looking.” Accountancy Europe is transparent, direct and ‘to the point’.

It’s a different world from that of 1986, when FEE was founded. Then, the European Union contained just ten countries and FEE’s member

organisations covered 21 countries. Now, Accountancy Europe’s membership boasts just shy of 1 million professionals, united in 50 professional organisations from 37 countries including all 28 EU member states.

Despite Brexit, CIPFA will remain an active member of Accountancy Europe joining the public policy debate on PFM.



### **CIPFA and the Korea Institute for Public Finance sign MoU to strengthen public finance management**

CIPFA and the Korea Institute for Public Finance have signed a Memorandum of Understanding (MoU) to promote strong public financial management in both countries.

The MoU establishes a partnership between the two institutes which will focus on improving government accounting by sharing learning and best practice.

The signing ceremony took place in Seoul, Korea with Ian Ball, Chair of CIPFA International, and representatives from the Korea Institute of Public Finance in attendance.

Ian Ball said: "CIPFA is delighted to be entering into a partnership with the Korea Institute of Public Finance as there is much synergy between the two bodies. Both institutes are committed to improving public finance so it is welcome news that we will be able to work closely together to strengthen governance, accountability and transparency.

"From sharing best practice, we hope that both bodies can make a positive contribution to building a better society through the promotion of strong public financial management."

### **Nigerian joins International Accounting Standards Board**

Christopher Nyong, from Nigeria's Cross River State, has been appointed to the International Public Sector Accounting Standards Board by the International Federation of Accountants (IFAC).

Nyong will serve for at least a three-year term, with possible re-appointment, and is the first Nigerian and the third African to be appointed, after a South African and a Kenyan.

The global organisation for the accountancy profession, IFAC has over 175 members and associates in more than 130 countries and jurisdictions. Based in New York, US, it represents almost 3 million accountants in public practice, government, education, industry, service, and commerce.

Nyong is a Certified Fraud Examiner (CFE) and the current auditor general of Cross River State, as well as a member of the Federation Account Allocation Committee (FAAC) and the Association of Certified Fraud Examiners. He is also a fellow of the Institute of Chartered Accountants of Nigeria, (ICAN), and CIPFA member.



### **CIPFA responds to local government finance settlement**

The provisional local government finance settlement for 2017/18 was issued on 15 December 2016. CIPFA's Head of Local Government, Sean Nolan, commented:

"Social care is in a funding crisis now so allowing councils with social care responsibilities to front load the maximum allowed precept increase is cautiously welcomed as a short-term boost to spending. However, we have three key concerns.

"First, the solution is a short-term sticking plaster that may not be able to save a system that is already haemorrhaging. It scarcely addresses the chronic under-funding now, never mind in the medium to long term.

"Second, because most councils were already planning to use the existing freedom to increase the social care precept by 2% in the next financial year, to bring it up to 3% is effectively only a real-term boost of 1% for 2017/18.

"Third, although the change to the New Homes Bonus will be a blow mainly to districts, the new resources for social care are to be welcomed for addressing the distributional inequalities that would otherwise have been caused by using the social care precept alone."

## Remodelling ‘trust, integrity, transparency’ for the next 30 years

To mark the 30th anniversary of the Federation of European Accountants (FEE) – and its rebranding as ‘Accountancy Europe’ – Chief Executive Olivier Boutellis-Taft explains how its watchwords of ‘trust, integrity, transparency’ are more in demand – and more in the spotlight – than ever.

After 30 years representing European accountants, auditors and advisors, it’s time to reflect on the past. Can you tell us why FEE was formed, and what it has achieved since 1986?

I’ve been here ten years, but I suspect this was the case for the 20 years before. It was set up for accountants to talk to accountants. Then the regulators, other experts and politicians came into the equation. But initially, it was a bit of a club for accountants talking to accountants.

Now we are more outward-facing. We are still experts in our field, the politicians still come to us for advice but we, as accountants, auditors and advisors, are listening to and engaging with stakeholders, with politicians, with NGOs, with society at large. And, society is talking to us.

If the old business model was a bit like the United Nations, now it’s more Google. A flat hierarchy, expanded expertise, breaking down silos, reaching more people. Perhaps in the past we would have eight-hour meetings, four times a year, where 200 people talked to each other. Now we can have a digital workshop where ideas are exchanged. A document can be co-created online in, say, two hours.

Why is now a good moment for a ‘reboot’?

We are – ultimately – providers of trust. And, as nobody can be unaware, the accountancy profession has been



FEE CEO Olivier Boutellis-Taft

through a period of intense public scrutiny. As the saying goes: ‘never waste a crisis’. This is an enormous opportunity to reinvent ourselves.

As a profession, we exist to serve the public interest for society as a whole. The new branding makes clear that people are at the heart of what we do.

Going forward, what are the biggest challenges facing the profession?

Automation. People and machines. People and artificial intelligence. I believe people are actually going to count even more, because they are going to become more strategic.

The computers can do the processing, but it is the people who do the interpreting. Machines can’t provide values and they can’t provide trust. We have the ability to process and interpret data. We are exercising judgement, not just textbook accountancy.

It’s an opportunity as well as a threat, of course. We tell our members ‘make technology work for you’, rather than just wait and see. We help provide ideas.

Continued on next page.

**Continued: Remodelling ‘trust, integrity, transparency’ for the next 30 years**

Perhaps unfairly, in the past accountants’ biggest worry was that their image was ‘boring’. Now, more worrying, it seems a question – in the light of LuxLeaks and the Panama Papers – of whether they are ‘trustworthy’. Is that fair?

Trust is the most fundamental thing professional accountants can add to society. Not looking the other way, but dealing with issues that can damage this trust is part of being a values-driven profession. Sometimes this means clarifying our role such as on tax policy. As professional bodies, our members ensure the high quality work of accountants and their ethical behaviour.

**Where does Accountancy Europe stand on country-by-country reporting?**

We have always been in favour of transparency. It has to be transparent where a company is active, and where it pays tax. Tax is a matter for society as a whole and thus a matter for public debate. Listening to civil society and addressing concerns with policy makers is integral to our approach.

And the Eurocrisis has not gone away, even if it is not in the headlines?

No. There is a big debate on bank assets. A debate on the role of accountancy standards. A debate on sovereign debt, a debate on public sector accounting, and a debate on public finance.

When it comes to different standards in European public sector accounting, we can provide a lot of input, expertise, and knowledge.

**How does Accountancy Europe represent its members’ members, when they range from the huge multinational corporations, to single partner practices?**

We try our best, but it is not easy – yet diversity is our strength. We represent both the public and the private, and from multinationals to single practitioner firms.

The smaller firms are also extremely important, as they serve SMEs that make up 99% of European companies. We try to integrate the perspective of these SME accountants into everything we do and we have specific initiatives aimed at SMEs.

Finally, on gender and racial equality – do you think the profession still has a long way to go?

It’s not too bad, but it varies from country to country. If you look at our members across Europe, overall we reflect society. There is a wide diversity of backgrounds in accountancy, and there will only be more specialisation in future, from engineering to human rights specialists and of course more tech backgrounds.

We are attracting younger people into the profession, and that’s important. We need to keep attracting the best and the brightest from the next generation.

### CIPFA and ZHAW begin strategic partnership to advance public finance

The Chartered Institute of Public Finance and Accountancy (CIPFA) and the Zurich University of Applied Sciences (ZHAW), School of Management and Law have signed a Memorandum of Understanding (MoU) on 11 November 2016 to strengthen public financial management across the world.

The MoU creates a basis for collaboration between the two organisations that will focus on using research and education to strengthen good governance and accountability in governments and public service organisations. CIPFA and ZHAW are already successfully working together on the Global Public Sector Accounting Survey.

The signing ceremony took place at CIPFA’s head office in London with Andreas Bergman, Director of the Department of Public Sector at SML, and Rob Whiteman, Chief Executive of CIPFA, in attendance.

Rob Whiteman said: “Both CIPFA and ZHAW are committed to strong public financial management so it is fantastic news that we will now be working closely together to serve the public interest.

“During these increasingly uncertain times, making the best possible use of public resources is more important than ever. CIPFA and ZHAW will seek to build the confidence and capacity of public sector finance professionals to help the sector respond robustly to any challenges.”

Professor Andreas Bergmann, Director of the Department of Public Sector at ZHAW, said: “We’re proud to further strengthen our partnership with CIPFA, the world’s leading accountancy body for public services which provides the benchmark of professional qualifications for the sector.”

“I’m convinced that the work of both organisations will benefit greatly from this new strategic partnership.”



MoU signing



# Institute matters

## Chinese delegation visits CIPFA head office

A delegation of 25 officials from the State Administration of Taxation of the Peoples' Republic of China (SAT) recently visited 77 Mansell Street for a training session.

SAT is a central government department which falls under the direction of the State Council. Among other things, SAT oversees the government's tax collection system and enforces applicable tax laws.

Alan Wan, Senior Trainer at CIPFA, had a very interactive engagement with the delegates who were so eager to learn about the legal and administrative scope of the UK's tax system.

The title of the session 'How UK Tax Authorities Collect Tax and Exert Their Power' looked at the remit of the UK's



Chinese delegation

main collecting agencies; the various tax types in the UK tax system and scope of the UK's legislative framework for taxation.

At the end of the session, Marcel Holder Robinson – Finance Policy Manager (Governments), on behalf of CIPFA, graciously accepted a special token from the group's team leader.

## UK facing uncertain times, says CIPFA CEO

In a presentation to CIPFA colleagues on 30 November, the Institute's CEO Bob Whiteman reflected on a "remarkable" 2016 and the "enormous feeling of uncertainty" generated both in the UK and worldwide by the unexpected EU referendum and US election results.

Whiteman said that "Brexit will happen", and that he expects the government to lose its appeal against the High Court's Article 50 decision in the Supreme Court. Prime Minister Teresa May will therefore trigger Article 50 in March 2017, giving the UK two years to negotiate the terms under which we leave the EU, and Whiteman anticipates a general election some time in 2019 following our exit in March of that year.

In regards to international developments, Whiteman referenced the US election, as the beginning of what we can expect on the world stage. With the Dutch, French and German elections due

in 2017, the world will watch with bated breath. Focusing on the UK economy, the CIPFA chief executive said that he expects inflation to rise, maybe as high as 4% in 12 months, since the value of imported goods has increased so much.

"A spike in inflation would put pay pressures on the NHS and public sector – and the government is running a very tight budget," he said.

Reflecting on the recent Autumn Statement – widely considered to have neglected the public sector – Whiteman weighed up Chancellor Philip Hammond's decision to borrow more money for capital infrastructure.

"The chancellor is investing in housing and highways – that will create jobs, which will help to inflate the economy.

But interest rates rising will have a knock-on effect, Whiteman warned. "There's a sword of Damocles over the

government," he said. "Growth will help to pay off our debt and improve public finances because more tax is coming in – but a growing economy means interest rates go up and the cost of our mountain of national debt will also increase. So the government will have to make more cuts to meet that."

Focusing on CIPFA's achievements in 2016, Whiteman praised the Institute for re-winning its NHS contracts which allowed it to provide a foothold in the health market for students. The London Counter Fraud Hub contract was also won. This exciting development is something that will be a benefit in the long term. As the current leader in this area CIPFA is hoping that we can reduce the impact fraud and corruption has on the taxpayer. CIPFA aims to raise its policy voice and tighten the link between what it is saying and what it's providing so that CIPFA can improve its engagement with its audience in 2017.

**Professional development of PFM reform leaders in the Nigerian state of Sokoto**

CIPFA had the distinct privilege of collaborating with the Alliance Manchester Business School and Ivy League Consult Ltd in a recently held study programme with delegates from the Sokoto State in North West Nigeria.

The Federal Government of Nigeria has embarked on a number of public financial reform initiatives which are being carried out at all levels of government. Consequently, the State of Sokoto, as part of its programme to adopt these changes, has taken a strategic decision to train this core group who are key leaders of state accounting, reporting and oversight in their respective ministries and parliamentary committees.

Participants of the programme included senior government officials from the Ministry of Finance (the Commissioner and Accountant General Sokoto State), directors of finance in other ministries, members of Parliament and directors of audit.

Marcel Holder Robinson, Policy Manager (Finance) in CIPFA’s Governments Faculty had the opportunity to engage the group with relevant technical topics including International Public Sector Accounting Standards (IPSAS), treasury single account and whole government accounting.

Mr Umar Ahmad, Accountant General (Sokoto) said, “The programme affirmed

some of the great work that we have started and also provided some very practical insights about other areas that we need to consider in our reform work. The Ministry of Finance and the Office of the Accountant General Sokoto State will endeavour to support other state entities and this timely programme has provided some fundamental lessons to help us do so.”

They were hosted at the Alliance Manchester Business School for an extensive four day programme which was designed to guide their strategic thinking and enable them to carry out these new initiatives successfully and sustainably.



Delegates from Sokoto State in North West Nigeria

**Advancing public sector leadership in Northern Ireland**

Together with its membership organisation partners, the Chairs’ Forum and Chief Executives’ Forum, CIPFA in Northern Ireland is leading the way to improve governance and leadership in public services in the Province. This was illustrated recently by the successful ninth annual governance and leadership conference in Belfast which was attended by top politicians, chairs and board members, chief executives and others charged with ensuring good governance in public bodies.

The conference was opened by Alistair Ross and Meagan Fearon, junior ministers in the Executive Office of the Northern Ireland Assembly, who set the scene by analysing regional governance through the recently published outcomes-based Programme for Government, the strategic plan for Northern Ireland. Other features of the

conference included a series of ‘café conversations’ where delegates had the opportunity to discuss a range of topical governance issues. The conference also learned lessons from the success of the Irish Football Association at the 2016 European Championships. The Chief Executive explained how they focused on strengthening the structure, systems and people in the organisation over the last five years ensuring it is properly governed as a foundation for its success.

The Northern Ireland Audit Office launched its ‘Board Effectiveness’ guide at the conference, designed to help strengthen the boardrooms of public bodies. The conference drew to a close with an informal presentation to Sir Malcolm McKibben, the outgoing Head of the Northern Ireland Civil Service who retires at the end of the year.



Junior Minister Alastair Ross, Junior Minister Megan Fearon, Terence Brannigan, Heather Moorhead and Colm McKenna

Steve Mungavin, Head of CIPFA Northern Ireland, paid a warm tribute to Sir Malcolm for his outstanding leadership during challenging political and economic times.

**Promoting good governance in Ghana**

At the invitation of international consultants Maddison Pine, in November 2016 CIPFA participated in a three-day workshop in Ghana aimed at senior public officials and organised by the Public Services Commission. ‘The Effective Board Secretary’ workshop was attended by 35 senior executives and board members from across a range of public bodies who are charged with ensuring good governance in their organisations.

CIPFA’s input was given by Steve Mungavin, Head of Northern Ireland, who has been providing governance training and advisory services for over ten years across the UK and more recently the Republic of Ireland and further afield.

During the workshop, Steve provided four sessions complementing local training input. Of his experience in Ghana, Steve says “whilst there is still a body of work to do to meet international governance standards, Ghana’s public services are relatively advanced compared with their African neighbours. The government has recently published a governance handbook and, through the Public Services Commission, is beginning to increase understanding of good governance and raise skill levels in the boardroom”.

Working through Maddison Pine, there are opportunities in 2017 for CIPFA to provide its Certificate in Corporate Governance in Ghana, one of CIPFA’s strategic target growth areas.



Governance workshop in Ghana

**International PFM practitioners visit CIPFA**

Crown Agents Training and Professional Development brought several senior government officials from Ghana, Zambia and Nigeria to CIPFA Head Office on 24 November 2016 as part of one of its training programmes. The delegates came from several sectors including health, higher education, banking and agriculture.

Giles Orr, Director of Learning Delivery & Partnership, greeted the group and shared some exciting work that CIPFA has been undertaking as part of its local and international strategy.

Through live stream, the group participated in CIPFA’s International Seminar 2016 *Beyond Base Camp: Delivering Excellent Public Financial Management* which was held in Luxembourg. Among the presentations watched was Nenad Pacek’s ‘Delivering financially sustainable public services in an uncertain world.’

Marcel Holder Robinson from CIPFA Governments Faculty interacted with the delegates, outlining CIPFA’s products and services. She said: “As (CIPFA) members, you also have the



Delegates from Ghana, Zambia and Nigeria

tremendous opportunity to tap into some very rich resources on public financial management, most of which provide practical insights on how to implement and improve on existing PFM activities.”

The delegates were attending a two-week course, *Best Practice Financial Management and Reporting on IPSAS and IFRS® Standards*, which has been designed to help them understand

the principles of the International Accounting Standards and to improve the standards of financial reporting, management and transparency in their organisations’ journey towards full compliance. Ken MacNeill, one of the course’s directors of studies, commented: “This has been a very rewarding and useful visit for our students. Thanks to CIPFA for its engagement and hospitality.”

# CIPFA-Penna Talent Spot

## The demand for Specialist Skills

The face of public sector finance is ever changing; there has been a noticeable shift and increased demand for finance leaders with specialist technical skills and areas of expertise over the last few years. This increased demand has been most noticeable for trading companies, pensions and treasury managers, HRA and schools finance professionals and of course not forgetting chief accountants.

The demand for interim and permanent managers has seen significant increase since 2010, which is probably not surprising as the continuing austerity and the need to provide greater service efficiency has made these individuals and the expertise they bring paramount to public sector transformation.

This means that CIPFA Penna, like other recruiters, has widened its talent pool to ensure good provision of experience. But it's important that clients are more open minded and welcoming

of candidates from beyond their own area and embrace those with wider experience such as central government, higher education, housing associations and the NHS.

In addition, if we are to secure the quality and quantity of candidates required, we must be more receptive to the transfer of skills and qualifications from those working in the commercial sector – we often want their commerciality and entrepreneurship but their lack of public finance experience causes concern.

Our advice, which has led to some great transitions, is to rule candidates in on their competency and then look at the sectors in which they have worked and do more due diligence, interview them and see if you can teach them the sector language. If you do you'll have more choice and more chance of succeeding in your recruitment.



Philippa Watkins of CIPFA Penna Recruitment

## On the move

### Mike Hill CPFA: Deputy Chief Executive and Director of Finance – Gedling Borough Council

Gedling Borough Council has recently appointed Mike Hill as Deputy Chief Executive and Director of Finance. Mike was previously Head of Finance at Bassetlaw District Council.



Mike Hill CPFA

### New CIPFA Head of Analytics and Research

CIPFA has appointed David Caplan as its new Head of Analytics and Research. David takes up the post on 10 January and will be leading on a range of CIPFA products and services including research, benchmarking, statistics and publications.

David brings a wealth of research and analysis experience, having been a director at both the Office of National Statistics and the Audit Commission.



David Caplan, Head of Analytics and Research

## 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**.

**Alison Chessell**

Chelmsford City Council

**Tanushree Datta**

KPMG

**James Fisher**

Northern Ireland Audit Office

**Jennifer Fuller**

Lancashire County Council

**Zakar Hussain**

Central & North West London NHS Trust

**Zoe Jagniaszek**

Tunbridge Wells Borough Council

**Peter Keys**

Queen's University Belfast

**Christopher James Mayo**

London Borough of Hillingdon

**Adam McKnight**

Blackpool Council

**Mark William Payne**

Weymouth and Portland Borough Council

**Karl Reginald Pease**

City of Bradford MDC

**Georgina Alys Wigmore**

Government Internal Audit Agency

**Edmund Lindsay James Willis**

Hertfordshire County Council

**Tracey Abdy**

The Moray Council

**David Robert Blanchard**

Lancashire County Council

**Clare Bricknell**

Southend-On-Sea Borough Council

**Rupert Paige Cornish**

London Borough of Camden

**Harriet Jean Fraser**

Home Office

**Philip Martin Hammill**

Liverpool City Council

**Felix Hanson**

Certified and Corporate Consultants

**Luke Heath**

Department for Work and Pensions

**Mohammed Kabir Hossain**

Bangladesh Navy

**James Martyn Lee**

West Sussex County Council

**Mark Paul Shanahan**

London Borough of Hillingdon

**Lynne Sharples**

Liverpool City Council

**Sunaina Roshan Shrestha**

Sundar & Co., Chartered Accountant

**Calum Alexander Smith**

Comhairle Nan Eilean Siar

**Suzanne Stevens**

Merseyside Police

## Focus on Fellows

CIPFA Fellowship is a new enhanced membership status open to CIPFA members of good standing with at least ten years' continuous service to signal their commitment to public services and enjoy privileged interaction with CIPFA and their peers. Find out more [online](#).

### First Fellowship Annual Lecture – Behind the scenes of Brexit

Award-winning political commentator and journalist, Steve Richards, was the special guest speaker for the November 2016 inaugural Fellowship Annual Lecture.

Over the last two decades, Steve has interviewed all the major political figures in Britain and remains at the heart of the Westminster bubble.

CIPFA Fellows were treated to a fascinating insight into Brexit and its impact behind the scenes at Westminster. Steve also shared his thoughts on mainstream media coverage, the physical and mental effect he believes Brexit will have on Theresa May, the government and the effect on public services.

Steve's captivating lecture was bookended by summaries from CIPFA President, Brian Roberts, who chaired the Fellows' exclusive event. Brian took the opportunity to thank our newest class of members for the enormous contribution they have made to the public sector and to the Institute and restated CIPFA's hope that the FCPFA designation will become a badge of honour and a source of aspiration to those just embarking on a career in public finance.



Steve Richards and Brian Roberts

The lecture was followed by a canape lunch and drinks reception and provided a great opportunity for public finance peers to catch up before the holiday season.

Have you been a member for ten years or more? [Apply to become a Fellow of the Institute](#) and enjoy privileged interaction with CIPFA and your peers.

## Member focus

**CIPFA member Alistair Ross travelled to Gaborone, Botswana, to provide accounting support to Young 1ove**

Young 1ove is a sexual and reproductive health rights focused organisation which gives young people across Botswana the life-saving information they need to protect themselves from unwanted pregnancies and HIV/AIDS.

It is one of the 500+ charity partners of UK based social enterprise [Accounting for International Development \(AfID\)](#), who arranged the volunteer assignment.

We caught up with Alistair on his return to hear all about his two-month placement.

“I first became interested in volunteering as I wasn’t particularly happy with where my career was going, and was struggling to get excited about going to work each day. I was working in public sector external audit, and I’d stopped feeling like I was having a significant impact. It felt like the time was right to take the plunge and do something different.

“When I arrived at Young 1ove the systems in place were sufficient for a local organisation with few reporting obligations, but their ambition was to deliver their programmes at scale across southern Africa, which would involve more onerous external reporting to a range of donors. I think some of the fundamentals and the new ledger system I helped put in place will put Young 1ove in a good position to expand and deliver their curriculum to more at risk young people in the future.

“I enjoyed working with the local accounting staff to help develop their skills from being processors towards being informed decision makers, and to always understand the rationale for the controls they operate. I also



Alistair Ross

really enjoyed connecting with visiting donors, and being able to demonstrate the improvements the organisation had made in its back-office functions, to provide them with reassurance that the organisation was on a sound footing.

“Outside of the finance team, I really valued visiting a school where the Young 1ove curriculum was being delivered. Actually seeing the grant funding in action had a deep impact on me. It was amazing to see how skilfully the team could communicate their message to a group of school children in just an hour.

“Volunteering gave me access to a wealth of opportunities to experience something different. I really enjoyed travelling whilst I was out there. I figured having travelled five and a half thousand miles to get there, weekend trips to Johannesburg, Cape Town, the Chobe National Park and Victoria Falls were in order.

I had some slightly surreal experiences I know I won’t have again – including getting stuck in traffic jams caused by cows just standing in the middle of the street, watching amateur boxing in a Zimbabwean youth hostel and being drafted in to a rugby match for the Gaborone Hogs against the Botswana Defence Force – all certainly memorable experiences!

“Volunteering has left me with some great memories, having met some fantastic people making a real difference in areas we don’t often think about. I’m now much more comfortable taking a leadership role, and in a much better position to explain complex accounting matters to non-financial experts than before.”

*Want to follow in Alistair’s footsteps? Visit [www.afid.org.uk](http://www.afid.org.uk) to start your own volunteer journey, or even a permanent move to the non-profit sector.*

## Funding a Healthy Future – our Annual Health and Social Care Conference

Over 70 delegates filled the house at our health and social care conference, hosted by Grant Thornton on 13 October. The event was part of a series of activities looking at ‘funding a healthy future’ during which the [PF Perspectives series of essays](#) on health and social care was published under the same title. We were delighted that a number of the contributors to PF Perspectives were able to present their views to our delegates.

With sessions covering Brexit, integration in Scotland and Wales, the NHS Rightcare journey, housing and health and attendance allowance, delegates were able to find out more about familiar topics as well as expand horizons beyond the day to day. Delegates complimented the speakers for their excellent presentations and provided suggestions for future events.

A full write up of the sessions, including the speaker slides, can be found at [CIPFA thinks, health](#).

A range of events is now in place to support colleagues working in health and social care. The Health and Social Care Finance Advisory Network has a plan of events for both the remainder of 2016/17 and on into 2017/18. Our second Integration Summit, joint with HFMA, on 9 February 2017 is open for bookings.

## Action under CIPFA’s Disciplinary Scheme

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

Mr Lakhbir Jaspal

After a hearing held on 28 June 2016, the Disciplinary Committee determined to expel Mr Jaspal from the Institute in respect of his having been convicted of eight counts of Fraud by Abuse of Position and being sentenced to a total of three years imprisonment.

The fraud had involved Mr Jaspal acting dishonestly in creating forged invoices in his own company’s name addressed to his employer, the Accord Group, for services that had not been provided and his approving the invoices for payment.

Payments totalling £325,944 had been made to Mr Jaspal’s company over the period August 2011 to September 2012 in respect of six forged invoices.

Fuller details can be seen [online](#).

## Mervyn Bowley

We were sorry to hear of the death on 22 October 2016 of Mervyn who worked for Cheshire County Council in a very senior position for many years.

Mervyn also served with distinction on the CIPFA Council again for many years, a champion of students and unusually for the time a non-Chief Officer member of the Council.

Mervyn was a gentleman as well as a master of his brief. When he retired he was a great loss to local government but we are delighted he had a very long retirement.

A full appreciation of his life will appear in the next issue of Spreadsheet.

**In conversation with: Bev Winter, Head of Finance, People Commissioning (Adults and Children’s), Essex County Council**

**What does your job involve?**

As Head of Finance for People Commissioning in Essex County Council I am a member of the People Commissioning leadership team providing financial advice and support on the strategic commissioning of people services including adults and children’s social care, education and public health services. This team takes the lead on the strategic health and social care integration work. I manage a skilled group of senior finance professionals within the council’s Financial Services team.

I’m currently working on our medium term resource plan. We work in partnership with commissioners and budget holders to understand what they are spending and the implications of any savings proposals, while providing constructive challenge. The team also provides financial advice and support to all the major procurements across adults and children’s services.

The big thing for me just now is our local authority engagement in the Sustainability and Transformation Plan (STP) process. We have been engaging with the development of three STPs that cut across the Essex County Council footprint to ensure the social care financial position is reflected in them. I strongly believe that to be successful we have to embrace a system wide approach.

My team makes all of this possible – I have a fantastic team and I couldn’t do my job without them!

**How important is finance training?**

I think it is fundamental for both finance and non-finance professionals. It is about understanding the drivers of the organisation/business/service, the costs and what drives those, the impact of spending or reducing spend and how that will affect other areas of the system.

Mutual understanding across health and social care finance cultures of the two areas’ funding and regulatory regimes is really important. This is an area of focus for Essex.

The skills acquired through professional finance training are essential and we champion these in our financial business partnering model at ECC. Three behaviours are expected from all members of Financial Services – that we challenge, that we have a voice and it is heard within the business and that through insight we can identify innovative solutions for the business.

It’s absolutely key that whatever the proposal, we can model the impact so that informed decisions can be made. Finance professionals have a big role in helping determine what the impact will be. We can help services to convert theoretical aspirations into practical solutions.

**What one thing would you like to change about how social care finance works in practice?**

This probably reflects the journey that we’ve been on in our organisation. Greater understanding about how health and social care finance works and the bureaucracy around the Better Care Fund. I think the intentions are good but I’m not sure it’s really worked as intended in practice. The Better Care Fund hasn’t really played a major role in bringing us together.

It’s how we align social care finance with health – we’ve got different funding regimes at the moment and that doesn’t work well. If only we could align these more, it would be helpful to all. And a shared awareness of the reasons for the differences would also promote joint working.

We also need to share a better understanding of the care market pressures across health and social



Bev Winter, Head of Finance, People Commissioning (Adults and Children’s), Essex County Council

care. I’m not sure we always articulate these as well as we should from a local authority perspective.

**What do you wish you had learnt when starting out in your career?**

Training to be an accountant is not all about the numbers! Communication and relationship building are equally important, as is collaboration. The thing for me that I didn’t really get when I was starting out all those years ago was just how important emotional intelligence is and being able to put yourself in the shoes of others.

**What are your proudest professional moments?**

The one which I am most proud of is the work in relation to the Care Act where I and the team at ECC were instrumental, in partnership with the County Councils Network, in convincing the DH that there was a significant affordability issue. There was a fixed quantum of funding and the work undertaken clearly demonstrated that there would be significant additional costs to local authorities. The outcome was a deferral of Phase II of the Care Act (Cap on Care).

## CIPFA Rewards for members

As it's a New Year, we've put together a range of benefits from [CIPFA Rewards](#) to help you get 2017 off to a great start and most importantly – to make sure you beat the January blues!

### Corporate Gym Membership – Free voucher

Get access to discounted gym membership at over 2,900 gyms including the main UK chains, leisure centres, budget gyms, independent clubs, yoga and pilates studios, cross fit boxes, bootcamps and more!  
[Claim your free voucher.](#)



### Save 10% with SuperBreak Mini-Holidays

You have access to a 10% discount on hotel accommodation with optional rail travel including Eurostar, flights, concert & events, theatre & dining, group bookings and much more!

[View more information to book your next break](#) or call 01904 436 002 and quote HB135.



### 10% saving on National Trust gift cards

Treat your loved ones to days out, country cottage breaks, a spot of lunch, cream teas, shopping trips, and entry to special places with a National Trust gift card. [View more information.](#)



## Public Sector Internal Audit Standards consultation and IASAB Chair vacancy

Nearly four years after the introduction of the ground-breaking UK public sector internal audit standards (PSIAS), the Internal Audit Standards Advisory Board (IASAB) is consulting on new and revised Standards.

The PSIAS apply across local and central government as well as health bodies across the UK and are based on the international Standards set by the global Institute of Internal Auditors.

These Standards have been updated from 1 January 2017 and the IASAB is proposing that the same amendments are incorporated into the PSIAS from 1 April 2017, along with changes to the public sector requirements and interpretations.

A full consultation paper, detailing the proposals and the questions being asked, can be found at [www.cipfa.org/policy-and-guidance/consultations](http://www.cipfa.org/policy-and-guidance/consultations).

The consultation runs until 31 January 2017.

Additionally, there is currently a vacancy for the role of IASAB Chair.

The position is for someone with a proven track record of chairing or strong leadership capability at a high level; with strong communication and presentation skills, including the ability to represent the IASAB effectively with a wide range of stakeholders; and an understanding of the UK auditing environment, both external and internal, and the role and influencing power of the IASAB in that environment.

Application packs are available from [Keeley Lund](#) at CIPFA with the closing date for applications of 31 January 2017 to the same email address.

Applications should be by curriculum vitae and a covering letter detailing how the candidate fits the relevant role description.

Interviews will take place in February and candidates are requested to indicate any dates on which they would not be available.



## Letters

Dear Readers,

Following several readers' suggestions, here at CIPFA Spreadsheet, we have decided to institute a new 'Letters' section. As our members' opinions matter to us, we encourage a healthy flow of thoughts and ideas.

We hope to publish a selection of readers' letters in future editions of Spreadsheet.

If you have opinions about issues, articles, current topics in your area of work or organisations or comments or suggestions for CIPFA, please get in contact with us to let us know.

Please send your letters to [Alyssa.howell@cipfa.org](mailto:Alyssa.howell@cipfa.org) or Alyssa Howell, CIPFA, 77 Mansell Street, London, E1 8AN.

Yours Sincerely,

Alyssa Howell  
Editor for Spreadsheet

## New Year reminder: renewal time for CIPFA members

The majority of CIPFA members will have received their membership renewal pack for 2017 during the month of December.

In keeping with CIPFA's membership subscription year, payment for 2017 membership falls on 1 January.

May we remind all members who have received renewal paperwork but not yet processed their renewal, to log on to your [MyCIPFA](#) account, complete payment, update your contact details and where applicable complete and submit your Annual Member Statement.

This year a guide to submitting your renewal online through MyCIPFA has been produced and can be found here: [Quick Guide to Online Renewal](#)

If you have any questions on any aspect of your membership renewal please don't hesitate to [get in touch](#).

## CIPFA is looking for new members to join its TISonline editorial board

As a member of the board, you would be involved in writing and updating content for that particular information stream (available through the CIPFA website TISonline) drawing on your own expertise and experience.

This is a voluntary activity, but it is an excellent way of meeting fellow practitioners, learning from others, and fulfilling CPD requirements and personal development goals at work.

Boards with current vacancies are:

[Planning](#) – looking for members with experience in finance and knowledge of working with local authority planning departments. We would welcome either finance practitioners with knowledge of planning, or for example a planning obligations officer who engages with the finance team. Please contact [jonathan.last@cipfa.org](mailto:jonathan.last@cipfa.org)

[Local Taxation](#) - looking for members, ideally with a revenues background and expertise in NNDR, and/or working in Wales. Please contact [jimmy.billingham@cipfa.org](mailto:jimmy.billingham@cipfa.org)

[Budgeting](#) – looking for new board members, with current knowledge of budgetary management in the public services. Please contact [alyssa.howell@cipfa.org](mailto:alyssa.howell@cipfa.org)

[Transport](#) – looking for members, ideally with knowledge of transport framework for Scotland and/or Wales. Additionally practitioners with up to date knowledge of Transport for London strategic policy would be very welcome. Please contact [alyssa.howell@cipfa.org](mailto:alyssa.howell@cipfa.org)

## Regional news

### Dr Arthur Hedley Marshall Award presented to Jim Kelly, Chair of Republic of Ireland Region

At the October Forum of the Regions, CIPFA President Brian Roberts presented Jim Kelly with the Dr Arthur Hedley Marshall CBE award for service to the Republic of Ireland Region.

Jim said that he was very appreciative of the CIPFA network of practising CPFAs that he had met through the regions. He had not only enjoyed their company but had received relevant professional advice and insights that had benefitted his public finance management skillset.

The Republic of Ireland Region improved its profile notably in 2016 with additional CPD events, submissions to central government and engaged positively with corporate CIPFA on planning for CIPFA's future in Ireland. In September the Region hosted a CPD event in Mayo and can claim to have one of the first Brexit presentations in the country delivered by Alan Bermingham, a CIPFA policy and technical specialist.



Jim Kelly – winner of Dr Hedley Marshall Award

Jim gladly accepted the honour and paid tribute to his fellow committee members who have worked hard to maintain the CIPFA profile and its sustainability. He previously was honorary treasurer and has been chair since 2011. He is due to step down in 2017. He retired from Dublin City Council in October 2016. He will continue to serve on CIPFA committees and remains active on not for profit and sports organisations.



The Dr Hedley Marshall Award



Mal Turner – Senior Finance Business Partner, Samantha Lewis – Assistant Director of Finance – Resources & Commissioning, and Chris Tidswell Head of CIPFA Wales

### CIPFA presents award at HFMA Wales Conference

CIPFA recently supported the 2016 Healthcare Financial Management Association's (HFMA) Wales Conference, presenting the award for training and skills.

The award was won by ABMU Health Board for its business partnering programme, in which it recognised a skills gap and developed a solution to meet the need. Pictured receiving the award, from left to right, are Mal Turner, Senior Finance Business Partner; Samantha Lewis, Assistant Director of Finance – Resources and Commissioning; and Chris Tidswell, Head of CIPFA Wales.

Subtitled 'Empowerment – people and places: the ambition for public services in Wales', the HFMA Wales Conference took place at Cardiff's Park Plaza hotel on 24 November. It is the country's biggest public sector conference, an intensive single day of plenary sessions and streamed optional workshops, followed by an evening of entertainment.

The 2016 conference focused on the challenging financial and economic conditions and the limits to how much public finance is available, exploring how public finance professionals and decision-makers in Wales can be empowered during testing financial times.

**CIPFA North West Annual Conference**

On 11 November CIPFA North West held their Annual Conference in Blackburn. This full day event provided an excellent programme for delegates to gain new skills and hear about developments in public sector finance.

CIPFA Vice President Andy Burns spoke about the work Staffordshire had been doing to transform the Council and make significant savings.

The theme ‘the only thing that is constant is change’ was evidenced with presentations from Oldham MP Jim McMahon on Oldham’s transformational regeneration journey and the Liverpool Health and Social Care Integration success from Becky Hellard and Tom Jackson from Liverpool Council and CCG.

John Wroe and Louise Horton from GT provided valuable advice on the tax benefits and barriers of alternative service delivery models.

The event also provided an opportunity for delegates to learn and refresh their leadership skills with interactive presentations from North West Employers’ Sharon Senior on coaching and motivational speaker and magician John Hotowka on achievement thinking.

CMI’s James Craig gave delegates a live demo of the Management Direct tools available to all CIPFA members on the website.



John Hotowka



Ian Cosh, Director of Resources, Lancashire Constabulary

**North East’s Sixth Annual Conference**

Almost 80 delegates gathered at The Sage, Gateshead on Friday 25 September 2016 for CIPFA in the North East’s Sixth Annual Conference, chaired as usual by Sir Tony Redmond, Past President of CIPFA.

The speakers included:

- Andrew Burns, Vice President of CIPFA, on ‘How can we drive collaboration across the public sector?’
- Richard Harrison, Director, CIPFA C.co, on ‘How to drive a commercial approach in the public sector.’
- Ian Cosh, Director of Resources, Lancashire Constabulary on ‘Financing modern policing using a collaborative approach.’
- Jon Walker, Tyne and Wear Archives and Museums, on ‘The entrepreneurial museum.’

- Louise Kempton, Senior Research Associate, Centre for Urban and Regional Development Studies, on ‘Decentralisation: issues, principles and practice.’
- Rob Whiteman, Chief Executive, CIPFA on ‘Forecast for public service finance.’
- Maxime Hewitt-Smith, Director of Finance, South Tees Hospitals NHS Foundation Trust on ‘Sustainability and transformation planning.’

The day was rounded off with a panel session with members of the audience holding a Q&A session with the speakers, and concluded with a drinks reception provided by the event sponsors, EY. Conference speakers, regional executive members and other invited guests then adjourned to the Crowne Plaza Hotel in Newcastle for a post-conference dinner.

**CIPFA Cymru/Wales annual conference and dinner 2016**

The CIPFA Cymru/Wales annual conference and dinner was held at the Park Plaza Hotel, Cardiff, on 24 November 2016. The conference theme was ‘Empowerment – people and places. The ambition for public services in Wales’. The events were extremely successful, with over 100 attendees for the conference and over 60 for the dinner.

After opening remarks from Iolo Llewelyn (President CIPFA Cymru/Wales) and Brian Roberts (CIPFA President), Mark Drakeford, the Welsh Government’s Cabinet Secretary for Finance and Local Government, delivered the key note speech. He outlined the government’s budget setting processes, including the ambition to move to multi-year budgeting, the risks to the Welsh budget arising out of Brexit and the progress being made in developing the government’s tax raising powers. The latter included outlining the negotiations being undertaken with the Westminster government to agree the future fiscal framework, which will govern the adjustments to be made to the Treasury block grant to the government following the introduction of tax raising powers in Wales.

The next plenary session was delivered by Brian Roberts (CIPFA President); he outlined the developments currently taking place within CIPFA, its new governance arrangements, its impact on policy development in the UK and globally, and its successes in developing its global training programmes.

Professor Tony Travers then provided a talk that linked the current challenges to political elites demonstrated by the recent Brexit vote, the election of Donald Trump as President of the

United States and the rise of populism in a range of European countries, to the need to reform tax policies in Wales. In particular, he noted the absence of a link between taxes raised in Wales and expenditure incurred by the Welsh Government and the resulting lack of accountability. He referred to the work of the Independent Commission on Local Government Finance Wales, and its recommendations on how to better empower and incentivise local authorities, through for example, the localisation of responsibilities for non-domestic rates.

Ruth Hussey, former Chief Medical Officer for Wales, outlined the increasing cost of healthcare in an aging society, health inequalities and the link between empowerment and health outcomes. In particular, she stressed the need to move from reactive health services to prevention, through better health education and allowing people to better control their healthcare.

In addition to the plenary sessions, a range of workshops were provided during the day, which were very well attended. The workshops covered topics as diverse as risk leadership (Zurich Municipal), empowering staff (ERPaaS), alternative delivery models for local authorities (Grant Thornton), Wales’ tax powers (Ed Sheriff from the Welsh Government), and the digital agenda – opportunities and threats (PwC).

The conference closed with a question and answer session. It was chaired by Don Peebles (Head of CIPFA Devolved Administrations Team), and the questions from the audience on a range of public finance topics were addressed by a panel consisting of Simon Robinson (Managing Director of ERPaaS), Brian Roberts (CIPFA

President), Alan Bermingham (CIPFA Technical Manager) and Chris Tidswell (CIPFA Wales Manager).

The evening started with the President’s drinks reception, which was followed by dinner. The guest speaker was the award-winning sports journalist and broadcaster Caroline Hitt. During the dinner, the CIPFA President presented a number of awards: to Ken Finch and Gill Lewis for their long years of service to CIPFA Cymru/Wales and its predecessor bodies, and to Martin Sollis, Nigel Aurelius and Dave Lilley in recognition of their contributions to the public sector in Wales and specifically to the development of public finance management and reporting. The President also presented CIPFA Cymru/Wales Executive members Steve O’Donoghue and Tom Bowring with a CIPFA regional innovation award for an event they had organised on the implications of the Well Being of Future Generations Act.

Our nominated charity for the year was Children in Need. A raffle held at the dinner raised £400.

The 2017 conference and dinner will be held on 23 November 2017.



CIPFA President Brian Roberts presents Ken Finch with an award for his years of service to CIPFA Cymru/Wales

## CIPFA North West Society Dinner

CIPFA North West held their annual dinner and awards ceremony in November 2016 which played host to the presentation of certificates to new members by CIPFA President Brian Roberts. Regional prize winners were also celebrated at the event for their successes during the year. Regional President Shaer Halewood paid tribute to the work and commitment of the

North West regional volunteers at what was her last formal engagement as Society President.

As well as two new members receiving their membership certificate – Emma Skelly and Adam McKnight, two members received awards for the highest scoring marks at FTPC – Dave Blanchard and David Hallworth.

In addition, Carol McDonnell was presented with the William Joliffe award for her work during the year in establishing and supporting the North West CIPFA Student Forum and Ken Finch was presented with the Barbara Key award for his lifetime achievement to the region.



Carol McDonnell & Brian Roberts



Dave Blanchard & Brian Roberts



Emma Skelly & Brian Roberts

## Student news

### CIPFA Cymru-Wales Student Event

In light of the recommencement of formal face to face training in Wales, CIPFA Cymru-Wales branch members recently hosted a lunchtime seminar with new students.

Current President Iolo Llewelyn kicked things off with an introduction to the role of the branch, how it fits into the wider CIPFA world and what we can and want to do for students.

Ex-students Tom Bowring and Tony Era shared some stories from their studies and emphasised the added value that can be gained from interaction with the various networks within CIPFA.

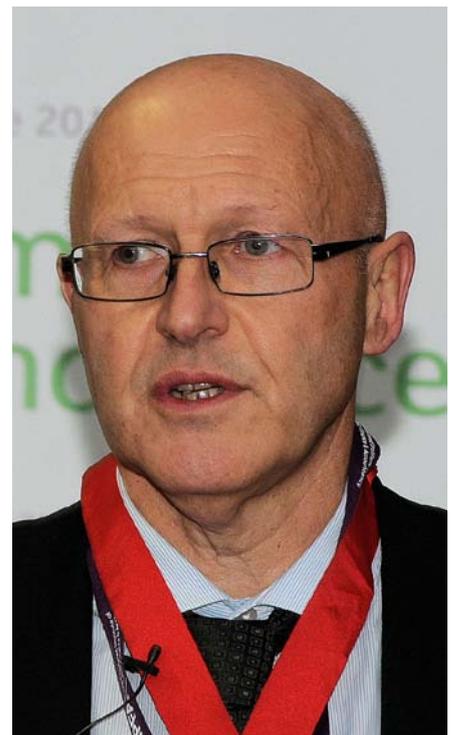
Tony is also the Welsh representative on the CIPFA Student Network and he gave a brief overview of what the network does.

During the session many questions were posed to the branch ranging from how best to study, to what does the membership fee get student members!

All comments will now be taken on by the branch to further engage with all current students in the most productive way in order to build our relationship and tailor our events programme to suit all members.



Tom Bowring, Operational Manager, Vale of Glamorgan Council



Iolo Llewelyn, Regional President of CIPFA Wales Cymru



Giles Orr, Director, Learning Delivery and Partnerships

### CIPFA prepares for the new Apprenticeships Levy

The introduction of the Apprenticeships Levy in April 2017 will present an opportunity for employers to train and develop a wider group of apprentices than before across the UK.

For the first time, a professional accounting standard will be approved and available for funding through the Levy.

In response to this, CIPFA will be offering its professional qualification route as an apprentice scheme, allowing employers to contract directly with us for training and assessment. We have held regional discussion groups with senior finance and HR professionals across the sector to

share ideas and issues, and in turn to help inform CIPFA's approach to the new arrangements.

We will be providing updates on these key initiatives. An early point to note is that according to current information, there will be no age or pre-qualification restrictions on apprentices.

This means that all (new and current) staff should be eligible to be funded through the Levy accounts.

If you have any questions, queries or thoughts on how you see CIPFA further developing its support in this area, please don't hesitate to contact Giles Orr ([giles.orr@cipfa.org](mailto:giles.orr@cipfa.org)).

### CIPFA and CIMA announce go live for 'CPFA to CGMA Top Up'

The new accelerated entry route for UK and international exam-qualified CIPFA members launched in early December.

The CPFA to CGMA Top Up through the CIPFA Gateway is a fast-track path allowing qualified CIPFA members to enhance their qualification and gain full CIMA membership and the globally recognised Chartered Global Management Accountant (CGMA) designation.

CIPFA members now benefit from up to 14 exemptions with the new CIMA Gateway route.

Members deciding to take up the opportunity will sit the Gateway exam (also known as the Management Case Study exam). Successful candidates will then move on to the Strategic Case Study exam, bypassing CIMA's three Strategic level Objective Tests.

Following the launch Rob Whiteman, CIPFA Chief Executive, said: "This landmark offering provides CIPFA members a fantastic opportunity to build their management accounting skillset.

"With the reconfiguration of public services, our members are increasingly working across public and corporate environments and require multiple specialist skills that straddle sectors. The new route promises to support this by boosting capacity and thereby also maximising value for employers for staff seeking to extend their continuous professional development."

Andrew Harding, Chief Executive at CIMA, said: "CIMA is excited about the growing collaboration with CIPFA. This is an important step to strengthen our partnership with one of the most respected professional bodies in the public sector. Our CGMA designation is recognised across the world as the designation for management accountants. We are delighted to share our expertise and knowledge and to enable CIPFA members to gain our globally-recognised qualification."

Information on the new route can be found on the [CIPFA website](#).



**Chartered Institute of  
Management Accountants**



# Events

## 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](#)

### CIPFA ACTUARIAL SUMMIT

*28 January, London*

This summit will provide an invaluable opportunity to hear from each of the actuarial firms involved in the March 2017 valuation of the Local Government Pension Scheme and quiz each of them, as well as providing an insight into the important role the Government Actuaries Department will be undertaking for the first time at this valuation.

[www.cipfa.org/training/a/actuarial-summit-2017-20170125](http://www.cipfa.org/training/a/actuarial-summit-2017-20170125)

### POLICE, FIRE AND RESCUE INTEGRATION CONFERENCE

*8 February, London*

The event will be chaired by Nigel Hiller, Chair of CIPFA's Police Panel, and Director of Finance for Humberside and South Yorkshire Police. A detailed programme is being finalised at present and will include a range of speakers from those involved in policing and fire and rescue services.

[www.cipfa.org/training/i/implementing-police-and-fire-and-rescue-integration-finance-and-governance-issues](http://www.cipfa.org/training/i/implementing-police-and-fire-and-rescue-integration-finance-and-governance-issues)

### CIPFA SCOTLAND PUBLIC FINANCE CONFERENCE

*30 – 31 March, St Andrews*

The 2017 conference will be held at the [Fairmont Hotel](#) in St Andrews on 30 and 31 March. Further information will be available soon. If you have any questions, please email [mark.mclean@cipfa.org](mailto:mark.mclean@cipfa.org). [www.cipfa.org/training/cipfa-scotland-public-finance-conference](http://www.cipfa.org/training/cipfa-scotland-public-finance-conference)

### GOOD GOVERNANCE IN SCOTLAND A COMMUNITY CHALLENGE

*18 April, Edinburgh*

CIPFA's annual one day learning and development session on governance will provide public sector professionals with an essential update on outcomes, risks and developments in governance.

[www.cipfa.org/training/g/good-governance-in-scotland--a-community-challenge-20161208](http://www.cipfa.org/training/g/good-governance-in-scotland--a-community-challenge-20161208)

### CIPFA TREASURY MANAGEMENT CONFERENCE

*15 March, London (Save the date)*

[View all CIPFA conferences around the UK](#)

## Accredited Training Programmes

### ESSENTIAL SKILLS FOR BOARD MEMBERS

*13 March 2017, Belfast*

This course provides board or elected members with the knowledge, skills and confidence to be effective board members.

[www.cipfa.org/training/e/essential-skills-for-board-members-20170313-northern-ireland](http://www.cipfa.org/training/e/essential-skills-for-board-members-20170313-northern-ireland)

### 2016/17 ACCOUNTS CLOSEDOWN WORKSHOP

*2 February 2017, Bristol*

The workshop programme covers the key changes impacting on the production of the 2016/17 financial statements. It also considers approaches to addressing the faster closedown agenda and actions required to prepare for future changes in the Code, such as the re-measurement of the Highways Network Asset and changes to accounting standards.

[www.cipfa.org/training/2/201617-accounts-closedown-workshop-20170202](http://www.cipfa.org/training/2/201617-accounts-closedown-workshop-20170202)

### REVENUES IN TRANSITION

*2 February 2017, Cambridge*

The programme for this event covers the key changes in business rates and council tax that local authority revenues practitioners need to be aware of in 2017. These include a focus on the necessary preparation for annual billing 2017/18, and a detailed look at the 2017 revaluation and new transitional relief scheme for the 2017 list.

[www.cipfa.org/training/r/revenues-in-transition-20170202](http://www.cipfa.org/training/r/revenues-in-transition-20170202)

### PREPARING THE PENSION FUND ACCOUNTS

*14 February 2017, Edinburgh*

This is a one-day event aimed at Pension Fund accountants using the accounts as the 'anchor' for practically based training supplemented by exercises to reinforce the learning. We will be using a line-by-line approach to de-construct the accounts allowing learners to understand how the regulatory and financial reporting framework impinges on the various operations which form the Pension Fund.

[www.cipfa.org/training/p/preparing-the-pension-fund-accounts-20170214](http://www.cipfa.org/training/p/preparing-the-pension-fund-accounts-20170214)



## Public Finance Innovation Awards

CELEBRATING OUTSTANDING ACHIEVEMENT AND INNOVATION IN PUBLIC FINANCE AND GOVERNANCE

*20 April 2017, London*

The sector has shown remarkable resolve and fierce determination despite years of funding uncertainty and fiscal consolidation. In the context of these challenges we have launched the Public Finance Innovation Awards.

These prestigious awards – new for 2017 – place a premium on exceptional and original achievements by public finance and governance teams and individuals, showcasing how innovation has pushed the sector forward.

Winners of the awards will be announced at a glittering awards ceremony in central London on Thursday 20 April 2017.

This momentous evening is the perfect occasion for you to celebrate your hard work and achievements, and network with more than 300 senior financial decision makers, suppliers and guests.

Join the celebration: tickets can be purchased online at [bit.ly/pfawards\\_bookings](http://bit.ly/pfawards_bookings)

For more information contact [rhianna@redactive.co.uk](mailto:rhianna@redactive.co.uk) or call 020 7324 2771.



## Regional Events

### Midlands

ATTENDING THE GFIAE?

CIPFA will be at the Government Finance and Internal Audit Event (GFIAE) in Birmingham this February. If you are attending then be sure to come and say hello by visiting CIPFA's stand. Please also attend our Institute update led by Gillian Fawcett, Head of Central Government Faculty, and CIPFA's workshop on Open Book Accounting. More information on the event is available online:

<https://registration.livgroup.co.uk/govfinanceaudit2017/>

### South West

CIPFA IN THE SOUTH WEST - THE IMPACT OF BREXIT

*19 January 2017, Bristol*

How Brexit will affect the public sector from three points of view. Followed by a question and answer forum.

[www.cipfa.org/training/c/cipfa-in-the-south-west--the-impact-of-brexit-20170119-south-west](http://www.cipfa.org/training/c/cipfa-in-the-south-west--the-impact-of-brexit-20170119-south-west)

## Wales

CIPFA IN WALES BREAKFAST WITH THE BANK OF ENGLAND

*19 January 2017, Cardiff*

This popular briefing from the Bank of England's Agent for Wales returns, free of charge for CIPFA members. Hear the latest take on economic forecasts and the Bank's assumptions and observations on them – even more important now, given Brexit!

[www.cipfa.org/training/c/cipfa-in-wales--breakfast-with-the-bank-of-england-20170109](http://www.cipfa.org/training/c/cipfa-in-wales--breakfast-with-the-bank-of-england-20170109)

# 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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