

President's message



It feels slightly unreal to be writing this message as the current ICAEW SW President from my home 'office' having not met any of you face to face since March. But then I imagine many of you are asking yourself 'Is this really happening?' or 'When will it all go back to normal?'

Even though we cannot meet face to face, it has been great for myself and others on the Committee to see video conferencing technology become the norm, and this has enabled us to virtually gather groups from all over the South West, to share experiences and offer advice. From these meetings we have been gathering valuable feedback for ICAEW, to help ensure central resources meet the needs of all members.

We also met recently as a South West Strategy Board and asked ourselves a number of questions about the state of the region and prospects for the future. We finished the meeting with an interesting discussion on whether we will ever 'go back to normal', and what that means for the region's IT infrastructure, working practices and commercial property prices (among other things). There is no clear picture of when and how the future will settle into a new pattern, but it seems unlikely things will ever go back to the 2019 way of working.

For many, these changes can be incredibly challenging, and as a district we will continue to encourage members to use the excellent support offered by CABA (www.caba.org.uk) and will work to run some CABA events in the region when lockdown allows. Sharing ideas and experiences can also be very cathartic and if you would like to join one of our regional virtual networking events, please contact our Regional Executive, Trudi (trudi.coles@icaew.com).

Of course, there are also some upsides to a more virtual working environment. The South West is a very geographically spread out region and it can be hard to connect with others without a significant amount of travelling. I am sure that many of us are enjoying less time in the car and more time with our family, while still being able to virtually meet people from all over the region.

So, let's work to make the best of the current situation, by spending time with those we can, while connecting virtually with those we are still isolated from. Life needs to keep going in the current situation, so please do connect with district, browse the resources ICAEW has prepared and keep your CPD up to date. I firmly believe that chartered accountants are the key to helping businesses recover, and we can work together to ensure businesses get the best support possible.

Finally looking to the future, when will we be back to face-to-face district events? That is something we cannot confirm at the moment, but we will continue to look closely at government guidelines and the availability of venues and confirm a plan as soon as we can. Let's hope we can at least have an annual dinner in 2021!

While my presidency has been pretty weird so far, I am excited by all the ways we are making the most of the situation to support members and am looking forward to the future when we can get together again.

So in the words of the song, 'We'll meet again, don't know where, don't know when, but I know we'll meet again some sunny day!'

David Norris

DATE FOR YOUR DIARY

Annual Dinner



Friday 23 April 2021
Sandy Park, Exeter

With award-winning, stand-up comedian Jo Caulfield as guest speaker

Contact Trudi to register your interest - trudi.coles@icaew.com

SWTAC Chair retires after 34 years



Mark Gifford-Gifford, who has chaired the ICAEW South West Technical Advisory Committee since 1986, has stepped down from the role due to ill health although he does hope to continue to attend meetings and contribute whenever possible.

Andy Holton, Technical Director at Mercia and National TAC representative said 'SWTAC is one of only a small number of district TACs that continues to meet regularly and also sends delegates to National TAC. The continuing vitality of SWTAC is due in no small part to Mark's dedication to the committee over the many years he has been involved.'

Mark first became involved with ICAEW while living in Shropshire and was a committee member of the Staffs, Salop & Wolverhampton Society.

He moved to Exeter in 1974 and joined ICAEW South West (formerly SWSCA). As well as his very long-standing role as SWTAC Chair, Mark was also Chair of the Exeter & District Society of Chartered Accountants in 1988/89.

Mark has also been involved with ICAEW at a national level over the years including helping to create a new Hong Kong qualification, ICAEW Chair of the Accounts for Employees Committee and the Centenary Committee.

His professional life in Exeter started as Senior Lecturer in Accounting at the University of Exeter and then went on to set up the University's Management School and became Director of Centre for Management Studies. After officially retiring from the University he continued to supervise dissertations and thesis' until finally retiring at the age of 77.

Other roles included running a small practice and management consultancy, serving a three-year term as Chair of the Lombard Committee in London and sat on the Military Education Committee which discussed, planned and guided education for the armed forces.

We are hoping to thank Mark personally for his huge commitment to ICAEW South West as soon as face-to-face meetings resume, hopefully by the end of the year.

THE FUTURE OF SWTAC

Following the end of my tenure as ICAEW SW president, I found myself asking, so what next? With Mark Gifford-Gifford stepping down from chair of the SW technical advisory committee this seemed like too good an opportunity to miss! I rather enjoy the technical grit which comes with being a technical partner in a regional firm and having been a participative member of the technical advisory committee for a couple of years I was keen to ensure that the voice of those in the SW continued to be heard. The technical points and exposure drafts which are discussed at the committee meetings are often very finite and I am therefore keen to increase the committee's engagement to ensure that we get the right specialist input making our comments and contributions both valid and relevant. My vision is that the committee will have a small core of regular members along with a wide support network of individuals with specific skillsets, specialisms or niche areas of expertise. I have chosen to change the format of the meetings such that they are virtual and are first or last thing to ensure that they are not a barrier to the working day but instead a kick start or grand finale! Should you be interested in spending a couple of hours a quarter influencing the future of accounting standards or regulation then please do get in touch with Trudi Coles trudi.coles@icaew.com setting out the scope of your interests and experience. We would be very pleased to hear from you and welcome you to our network!



Sophie Parkhouse
SWTAC Chair

ICAEW SOUTH WEST GOLF DAY – A DATE FOR YOUR DIARY

Due to the coronavirus pandemic the 2020 event was cancelled.

The 2021 ICAEW South West Golf Day will take place on Thursday 17 June 2021, at Trethorne Golf Club.

Contact Tony Jopson if you would like to receive further details:
tony@tonyjopson.co.uk

Welcome to David Norris, President, ICAEW South West

David Norris,
President, ICAEW
South West



On 13 May at the annual general meeting of ICAEW South West, David Norris was officially elected as the President for 2020–2021.

In this article we will find out a bit more about David and what he has planned for his year in office.

QUICK FACTS:

Name: David Norris

Current employment: Director,
Mercia Group Limited

Qualified: 1996

Hometown: Honiton, Devon

Family: Married to Liz (25 years in July 2020) with two children Abby (14) and William (11)

Interests:

Motorbikes, target shooting and guitars

Why did you put yourself forward as a district society office holder?

I initially joined the committee to represent SWAT as we had started providing the course programme for the district. Over time I was impressed with the enthusiasm of the committee and how they worked hard to help and support members across different geographical and industry areas. This made me keen to get involved and be part of the ongoing work.

What is your priority for the coming year as President?

I have a real interest in IT and how it can help working practices evolve and improve the information accountants can provide. As at the time of writing we are in lockdown, it has become clear that good IT use is not a 'nice to have' but an essential tool for accountants in all areas. However, lockdown has been stressful for many firms and individuals, and so we want to facilitate virtual contact between as many individuals as possible to support them and share best practice ideas. If I was to summarise my year with the impact of COVID-19 still to be fully realised, it would be Adapt to Survive.

What do you think the society does well?

We have an excellent range of committed volunteers on our committee, all with varied roles, ages and backgrounds. This makes our discussions all the more exciting and any feedback the main committee or the TAC provides, all the more valuable to ICAEW.

What would you like the society to do more of?

In the short term, we want to ensure that we provide as much support as we can for firms dealing with homeworking and having to adapt to the fast-paced rate of government announcements. We have already started virtual town groups and are looking to expand the range of sector-specific virtual networking groups.

Ideally I'd like to increase the amount of time firms spend discussing how to make IT work for them and encouraging firms to prepare themselves for a future where flexible working and 'clever' IT systems mean our old ways of operating may no longer be relevant.

You took over from Sophie Parkhouse at the AGM. What do you think was her standout achievement/event/initiative/contribution etc this year that she will be remembered for?

Sophie did a great job of bringing enthusiasm to the role and for really being a champion of both the district, ICAEW nationally and of the role that firms can play in developing individuals to reach their full potential.

Next May Ros Aala will take over from you as President. If we asked him the same question about you, what would you want his answer to be?

That he kept his cool in a difficult time, that he listened to accountants of all backgrounds and that he found ways to ensure as many as possible got the help and support they needed.

OFFICE HOLDERS FOR 2020 - 2021

President: David Norris
Deputy: Ros Aala
Vice: Adam Croney
Treasurer: Philip Littler

Outgoing President's Message



our first sustainability event virtually as the original event was unfortunately cancelled due to the lockdown.

I set out to make a difference and having now put this down in words, with the support of a fantastic committee and regional ICAEW team, and despite the lack of glitz and glamour at an annual dinner, I am confident that this has still be achieved. Thank you to you all.

Sophie Parkhouse
Immediate Past President

Being one for reflection, I would like to look back and share with you my year as president.

I started the year with a theme of 'The Future South West Professional' and at that time I remember saying 'it is quite a good theme as no one really knows what it will mean!' I most definitely would not have predicted what the future really had in store for us.

A presidential year ordinarily includes a lot of networking and representation of ICAEW SW at regional events, however given the COVID-19 pandemic this was not the case for the later part of the year. I am hopeful that those of you whom I have met will agree that I do my best to look for the upside in a situation. Applying this to my presidential year I believe that despite the challenges I have made progress with the theme, achieved my objective and am pleased that David Norris would like to build on the theme for his year.

From a technology perspective, we supported members in practice with a specific update on how their practices could benefit from the use of technology, and also included a technology thread to the member in business update. Just before the outbreak of COVID-19 we agreed to hold our first committee meeting using a mix of face-to-face contact and Zoom, cutting down travel and time for the members and making the meeting more accessible to a wider range of participants. The meeting was seen as a success and meant that when virtual meetings were forced upon us we were not only ready for the virtual world but were confident that it was just as effective as traditional means. The ICAEW SW AGM was also held in a successful online format resulting in the engagement of members who had not previously attended ICAEW SW events. The committee are keen to build on this wider engagement and accessibility and are very much looking forward to 'e-meeting' you at future, evolving, virtual events.

The committee has also started to consider the impact that it has on the environment and how we can promote sustainability on a wider basis in conjunction with our members. On the back of this I am pleased to announce that we now have a sustainability representative on the committee, who has enhanced the sustainability of this newsletter, and we are now looking to host

EXETER JOINT PROFESSIONS NETWORKING GROUP MEETS VIRTUALLY

ICAEW members joined other local professionals for the group's first virtual event to hear from Richard Marsh, Project Director - Liveable City for Exeter City Council who gave a very interesting presentation on 'Building Back Better: How Exeter's future is bright and what we need to do to ensure that the city's potential is realised'.

Liveable Exeter Garden City is an ambitious plan including building 11,000 new homes in a unique way to improve quality of lives and reduce inequalities. It will focus on eight key sites over the next 20 years.

The plan includes:

- Take the best of what the city/region has
- Learn from the past
- Plan for the future

Work in partnership (public and private) to deliver development which meets the growth needs of the city, without compromising on quality.

- This means building sustainably
- Building quality
- Building mixed use communities - to work, live and play
- Creating opportunities for active and sustainable travel
- Taking a long-term view of 'value'
- Take a 'place - based' approach, no 'one size fits all'

One of the exciting projects already underway is the building of St. Sidwell's Point, one of the world's most energy efficient leisure centres (see photo below).



IT'S NOT JUST EVERY CLOUD THAT HAS A SILVER LINING!



In his Summer Statement, The Chancellor announced a new wage subsidy for apprentices recruited between 1 August 2020 and 31 January 2021. Employers will receive £2,000 for each apprentice they employ between the ages of 16-24 and £1,500 for apprentices aged 25 or over. These are on top of the existing employer incentives of £1,000 for apprentices aged between 16-18 years AND free apprenticeship training for the same age bracket if the business employs fewer than 50 staff.

You are clearly not going to recruit someone just to obtain the benefit of the grant, but it does provide an incentive if you are umming and ahing about whether to recruit or not.

Also, given that the employer contribution required towards the tuition cost of apprenticeship training is now down to 5% of the apprenticeship funding, the above wage subsidy more than covers this 5% cost for the whole of the Level 7 ACA Apprenticeship, let alone for a Level 2, 3 or 4 Apprenticeship.

We would love the opportunity to discuss the latest apprenticeship funding that is available, along with your training objectives for the next 6 to 12 months. We can give clarity on the best ways

to ensure your business has sufficient staff capacity for the future and we can also provide guidance on your recruitment and training plans.

In order to support your plans, our training provision has developed extensively over the years and we now provide:

- Accounting Apprenticeships - covering Levels 2, 3 and 4 for AAT exams and Level 7 for the ACA exams.
- Distance learning courses - covering all the above AAT levels.
- The Balancing Act - a self-study bookkeeping course which can quickly turn recruits into productive staff in as little as a week.
- The Bookkeeping Aptitude Test - to assess candidate suitability before you employ them.
- The Talent Programme - a no fee recruitment service to help you employ the best trainees.

We work closely with our students to ensure they are exam ready but also, and equally importantly, to ensure that they have the practical knowledge and skills to be a valuable asset to your team and your clients. We have training centres in Taunton, Exeter, Plymouth and Falmouth and since lockdown we have been able to continue our day release sessions virtually on MS Teams. We will continue to offer this even when our normal day release sessions start again in September. We use Exeter as the base for our ACA programme, for which a new cohort will start this Autumn - the only ACA training offered here in the South West.

If you would like to discuss any of the above training and funding, do give me a call on +44 (0)1392 244 071 or email me at simon@accountancylearning.ac.uk

Simon Deane BA, FCA

PROSPERING IN DIFFICULT TIMES - YOUNGER MEMBER REGIONAL SUPPORT PROGRAMME

ICAEW has been holding a series of round tables with younger members across the country who are experiencing the first recession in their working lives. The purpose of these consultations is to find out what they are concerned about and what support they need. This is to ensure that ICAEW is providing them with appropriate resources and virtual events.

The South West Region event was held at the end of July and included two local members who have been through a recession or another professional crisis. Rick Sturge, CFO of Grafton LSR Ltd based in Bristol and Sophie Parkhouse,



a Partner at Albert Goodman gave very different but equally interesting talks about their own experiences of coping with and prospering in challenging times, particularly focusing on the question 'What got you through the bad days and difficult decisions'. This was followed by questions and some really good discussions on how important it is to be happy, trust your instincts, be brave and honest with yourself.

Celebrating 100 years of women in chartered accountancy

On the evening of 4 August SWECASS and younger members came together online for a virtual event celebrating 100 years of women in chartered accountancy. The event began with a talk from ICAEW Immediate Past President Fiona Wilkinson about Mary Harris Smith and the barriers she faced on her way to becoming the first female chartered accountant as well as how ICAEW has been celebrating this historic milestone.

Following this we heard from not only Fiona but also Caroline Smale (ICAEW Practice Committee Chair and Partner at Bishop Fleming Chartered Accountants) and Sophie Parkhouse (Immediate Past President of ICAEW South West and Partner at Albert Goodman LLP) on the subject of their own career journeys and in particular how those experiences have been shaped by being a female in the profession.

Fiona talked about the fantastic experiences that getting involved with ICAEW has afforded her, particularly in her time as president. She discussed how employers are often supportive of these roles as they are invaluable in developing soft skills and urged us to grasp opportunities to get involved as much as possible.

Caroline described her journey from her first day in audit to the role she has now and how things have changed along the way, including not having

to ask to wear trousers in the office anymore! Her advice to those of us early on in our careers was to be brave, be visible and don't hold back.

Sophie then shared with us how she had come to choose a career in accountancy and how her work has evolved with her changing needs. She emphasised to us the importance of putting yourself in other people's shoes and seeing things from other perspectives when striving to do your best, as well as looking for opportunities to do more rather than simply what you've been asked to do. Sophie also recommended that we take the time to check in regularly with ourselves and ask - am I achieving what I want to and is what I'm doing making me happy?

These talks were followed by a Q&A session including questions on work/life balance and tackling discrimination in the workplace. It was fantastic to hear from all of our speakers, we are extremely lucky to have such inspirational women in the South West and we would like to again thank Fiona, Caroline and Sophie for taking the time to speak to us.

If you enjoyed this event or unfortunately missed it, make sure you head over to our Facebook page to keep up to date with our plans for more events like this in the future. www.facebook.com/ICAEWSW



SWECASS



The SWECASS committee have had a busy time recently trying to plan events and plot the return to a new normal. We hope that you have all managed to stay safe in these difficult times. Unfortunately, due to COVID-19, we have had to postpone our annual summer social.

SWECASS has just hosted its first virtual event Celebrating 100 years of Women in Accountancy. We were fortunate to have three inspirational women attend the event to share their stories of how they succeeded in the world of accountancy.

The committee are hoping to host more virtual events on a range of topics in the future, so please watch out for email alerts and Facebook posts advertising these events.

As always in September, we will be welcoming the new students into the society. Due to the current situation we will be unable to host new starter nights as in previous years. However, the committee will be planning Covid-safe events and talks to engage with new starters.

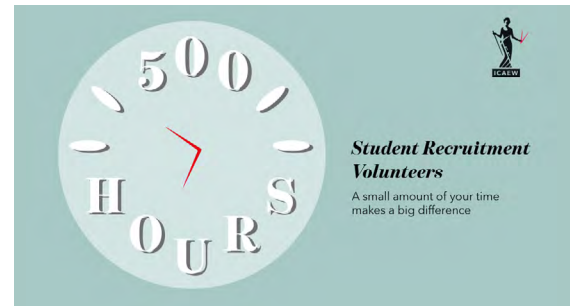
As a committee we will continue to be a voice on the wider ICAEW stage, representing you and feeding back relevant information. I would therefore strongly encourage you all to become involved whatever stage you are at in your accountancy studies.

We know that finding time in between studying and work can be difficult, but spending time with people who are going through, or have recently gone through, the same challenges can help you build a strong support network.

If you would like to become involved or attend our future events please get in contact via email or find us on social media!

Georgina Myles - SWECASS Chair
GMyles@bishopfleming.co.uk

ICAEW 500 HOURS CAMPAIGN - CAN YOU HELP?



ICAEW has recently launched a new campaign to support members and ACA students looking to inspire the next generation of chartered accountants. Collectively, ICAEW wants to donate 500 hours of volunteering to schools and universities across the country in the 2020/21 academic year.

With the ongoing pandemic, they're working hard to ensure students from all backgrounds have equal access to careers education and they need your help to do it. By donating just one to two hours of your time, you can change the career prospects of hundreds of students across the UK.

There are a range of opportunities for you to get involved in, from careers fairs to delivering presentations to students about your career so far. Volunteering with ICAEW makes a great addition to your CV, and they'll provide you with support and resources to ensure you feel well prepared.

Please note that for the foreseeable future, all opportunities will be completed virtually as per government guidelines. They will make sure you have all the information to do this in advance.

To find out more, please [register your interest](#) or email 500hours@icaew.com

If you are already involved with a local school/college then please do let ICAEW know by emailing 500hours@icaew.com so that they can register your involvement and provide you/the school with up to date collateral and resources.

IBOUNCE EVENT

ACA students and young members based in Cornwall had an evening of after work trampolining in February at the iBounce centre near Bodmin. The dodgeball area proved to be a particular hit with those attending, as well as the interactive light games and 1.5m drop on to the giant air bag! After a day spent in the office it was the perfect activity to get our heart rates up and chat with fellow ACA students in the local area. We hope to run more of these after work events in the future once circumstances allow so keep an eye on the SWECASS facebook page for updates.



ICAEW COUNCIL MEMBER UPDATE – CAROLINE SMALE

ICAEW Council meets in July to look at strategy. This year we could not meet in person, but we managed to have two half days with virtual presentations and break out group discussions.

The conference began with a presentation from David Lancefield. David describes himself as a catalyst, strategist and coach. David's presentation was titled 'Repair, reinvent, accelerate' and provided some thought provoking ideas on developing a strategy.

Michael Izza then shared his thoughts on the changes we might see in the next decade. Such changes as technological advances, the drive towards sustainable business, the importance of the sustainable development goals, changes in demographics and the need to re-skill the workforce.

Council then turned its attention to our charter objectives, our vision and our three key strategic objectives: Future Professional, Connected Communities and the Agile Institute and discussed what these might look like by 2030.

The last session of day one was a panel discussion with six members sharing their thoughts about what the world might look like in 2030. The six panel members had varied viewpoints from business and practice, the UK and non-UK, from newly qualified to very experienced.

Day two was taken up with six challenging topics for discussion. The topics included: Admission by examination, funding models, international profile, size and scale, public interest and brand.

In the breakout groups, I chaired a group discussion on admission by examination feeding our views back into the main council group. The feedback is being fed into the development of the strategy, which will be taken back to Council at the next conference in October for further refinement before it is approved and implementation begins. Let's hope we can meet face to face in the autumn.

Council also re-considered the Fees and Subs for 2021 and confirmed that no increase would be sought in the member subscriptions for 2021.



Caroline Smale

ICAEW HELP AND SUPPORT

Many of you will know that as Council Member for the South West I have a mission that each and every one of our members makes the most of their subscription.

You will all hopefully be aware of the ICAEW Coronavirus (COVID-19) hub [icaew.com/coronavirus](https://www.icaew.com/coronavirus)

With a wealth of information on the furlough scheme and business support this has been invaluable to members so far. There is also a wide variety of virtual CPD courses and events including 'soft skills' and 'impact of Covid'.

It is also worth looking at the Global Recovery Hub [icaew.com/insights/covid-19-global-recovery](https://www.icaew.com/insights/covid-19-global-recovery)

The hub has some interesting articles on the role of accountancy in the global recovery whether from fundraising, international tax, fiscal policy and more.

Don't forget to take a look at the communities' pages and join up. Many are free and give access to articles and advice and information on events and training [icaew.com/technical/energy-and-natural-resources](https://www.icaew.com/technical/energy-and-natural-resources)

By now you should have received the new ICAEW magazine-*ICAEW Quarterly*. I'd love to hear your views on the content and format. This sits alongside the ICAEW Daily, Weekly and Monthly emails that you can sign up to in the preference centre on the website. The emails are full of timely advice and information and include a summary of news in brief. You can also sign-up to ICAEW's Daily news alerts here [icaew.com/insights](https://www.icaew.com/insights)

Brexit will also become a higher priority this autumn so do take a look at the resources available: [icaew.com/technical/economy/brexit](https://www.icaew.com/technical/economy/brexit)

There are also dedicated resources for:
Practice [icaew.com/technical/practice-resources](https://www.icaew.com/technical/practice-resources)

Business [icaew.com/technical/business-and-management](https://www.icaew.com/technical/business-and-management)

And finally, don't forget to use CABA. CABA supports past and present ICAEW members, ICAEW staff, ACA students and their close families from across the globe. www.caba.org.uk

Whether you are wanting to take better care of yourself, looking for personal development, career advice or financial assistance CABA can help.

ICAEW COUNCIL MEMBER FINANCE TRUSTEE - JOIN OUR LEADING CHARITY AND CONTRIBUTE TOWARDS THE IMPORTANT WORK WE DO IN RURAL DEVON

As our volunteer Finance Trustee, you'll be working with our CEO and Finance Manager, and advising the Board on all matters relating to yearly budgets, management accounts, financial policies and year end accounts. And as a member of the Board, you'll be part of the team responsible for all aspects of governance, risk management, strategic direction and operational performance.

We're keen to hear from experienced financial professionals, and from those looking to build their skills. You should possess a recognised accountancy qualification such as ACA, ACCA, CIMA, CIPFA, and have several years commercial, in-practice or similar experience. People from all backgrounds are welcomed.

You'll need to be able to give one to two days a month including attending eight Board and strategy meetings a year, and working with the management team on financial matters.

For a role profile and full details please contact: Heather Sparkes
trainingofficer@ruraldevoncab.org.uk

THE BOARD OF TRUSTEES OF BEAFORD (ARTS) IS SEEKING TO APPOINT A VOLUNTEER HONORARY TREASURER

Board member to maintain an overview of the organisation's financial affairs and to work in conjunction with the Director and the Board Chair to help to maintain its financial viability and resilience and to help ensure that proper financial records and procedures are maintained.

Beaford is a North Devon based charity and aims to connect artists and communities within the region by finding entertaining and extraordinary ways to explore our land, lives and future. We work with local communities and schools to present high quality arts-based events and activities in rural North Devon and have built up an impressive suite of interactions over 50 years of working in the region. We are responsible for the Beaford Archive, a photographic record of people in rural North Devon which contains more than 80,000 images by James Ravilious and Roger Deakins: this is considered to be '... a unique body of work, unparalleled, at least in this country, for its scale and quality'. Beaford also increasingly links with current environmental issues: rural North Devon is a UNESCO World Biosphere Reserve - part of a global network of special places inspiring a positive future by connecting people and nature.

We are proud partners of this Reserve and we have recently been working with communities to raise awareness of the designation and promote action through projects such as Plastic Free North Devon. We are an Arts Council NPO. See <https://beaford.org> for more about our work.

Beaford is based at South Molton, Devon and the Honorary Treasurer would be required to attend a minimum of four quarterly Board meetings and to participate in regular meetings of the Finance and Administration sub-group throughout the year, usually at the South Molton office.

For more information and details of the application process, please contact the Chair of Trustees (Tom Langdon-Davies) at tomgld1@aol.com

ICAEW SOUTH WEST CHARITY AND NOT FOR PROFIT GROUP

One of our local members the South West suggested a get together of our members who work in the sector. At that time, we did not know it would have to be a virtual event.

Not deterred by glitches in technology, we held our first meeting. It is not ideal as chair when the Wi-Fi in your village drops out, but I know from talking to many afterwards that it was good to get to together, get to know one another and to learn about experiences during lockdown.

The group shared experience of remote working, dealing with funding, safety of those benefiting from the charity and even a relocation of site during the pandemic. There were some real examples of resilience.

What was ever apparent to me is how much our members contribute to such an important sector and how valuable the skills of a chartered accountant are.

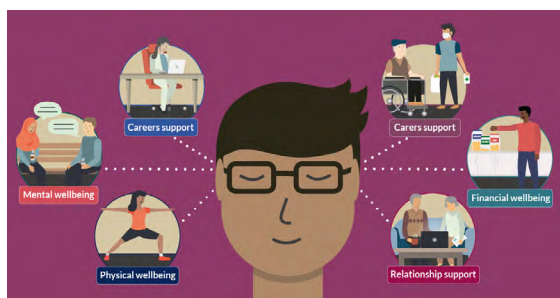
If you would like to be involved in the group or have suggestions for the content of future meetings, please do get in touch.
csmale@bishopfleming.co.uk

LOCAL SUPPORT FOR MEMBERS IN BUSINESS

The breakfast discussion groups for members working outside of practice are currently being held virtually most Friday mornings between 08:00 and 09:00. These meetings are a great opportunity to build up your contacts and share common issues and ideas in a confidential environment.

The popular Member in Business update sessions will also be held as live webinars in late November. Full details will be announced shortly. Contact Trudi (trudi.coles@icaew.com) for more details.

FACING WHAT'S NEXT, WITH CABA



assistance, plus free online courses, CABA can help you build confidence, maintain control and manage the impact of the immense challenges COVID-19 has brought - and empower you to take on what comes next.

CABA's free wellbeing support services are designed exclusively for ICAEW Chartered Accountants, ACA students and their families. To find out more about the services they provide and how they can help support you, visit www.caba.org.uk

The last six months have been unprecedented and a lot has changed. Almost every part of our lives has come to look very different, or in some cases changed completely. From our day-to-day routines to our fundamental sense of financial security, very little has been unaffected by the global response to the spread of COVID-19.

With so much change and uncertainty, taking care of your mental health has never been so important. Focusing on your wellbeing can help you cope with the challenges that you may now face and empower you to take what comes next at your own pace, holding on to the positive changes you've made - whether that's prioritising your health, exploring a new career path, focusing on your relationships, or becoming involved with your local community. And you don't have to do it by yourself. The Chartered Accountants Benevolent Association (CABA) offer free wellbeing support services to help you and your family - now and in the future.

Offering services from career coaching to professional counselling, legal advice to financial

CALLING ALL RETIRED MEMBERS: VIRTUAL COFFEE MORNING WITH CABA

We will be holding an informal video conference call on Wednesday 21 October from 10:30 and will be joined by Gareth Winters, Relationship Development Officer at CABA.

Gareth will give a general overview of CABA services for retired members and what support can be accessed through CABA from other external organisations such as Dementia UK, Age UK and Kooth.

Email Trudi (trudi.coles@icaew.com) to book a place/further details.

FREE CABA WEBINARS FOR YOUR PERSONAL DEVELOPMENT

September

Wednesday 16 13:30-14:40 Better People Management

Tuesday 22 09:30 - 10:30 Career Mapping

Tuesday 29 13:30-14:30 Persuasion and Influencing Skills

October

Wednesday 14 12:00 - 13:00 Do More In A Day Than You Do In A Week

Wednesday 21 13:30-14:30 Career Mapping

November

Wednesday 11 09:30-10:30 Better People Management

Friday 13 14:00-15:00 Emotional Intelligence In A Digital World

December

Tuesday 1 13:30-14:30 Persuasion and Influencing Skills

To book go to <https://events.icaew.com> and search Essentials Roadshow in 'Type of event'

You should then see the following listed: 'Essentials Virtual CPD Autumn CABA programme'

Please note these courses are live only and will not be available on demand afterwards

SUSTAINABILITY IN THE SOUTH WEST

The COVID-19 pandemic this year has been an unexpected shock to us on an individual, local, national and global level causing sudden and significant changes to the way we live and work. We will be continuing to adapt as we return to work, finding new ways of going about business to limit the risk of further spread of the disease and protect colleagues and clients.

It is possible that new ways of working will be with us to stay, at the very least until the risk of this virus is past, and some may stick for good, so future proofing is important. We are committed, as a country, to having 'net zero' greenhouse gas emissions by 2050 under the Paris Agreement 2015 - a global, legally binding agreement between 195 countries aimed at avoiding irreversible and dangerous changes to our climate.

The cost of bringing the UK to a net zero position is unlikely to be fully met by government 'savings' in other areas, particularly with the prospect of a global recession as the sting in the COVID-19 tail so businesses and consumers are likely to share the bill. Factoring this into current decision making will help to avoid any future costs of redesigning and reimplementing systems or incurring additional future spend.

Take travel and transportation in the post COVID-19 world as an example. A quarter of UK household emissions are produced from cars, vans and HGVs, of which a significant proportion is the daily commute to work and business travel, so it is inevitable that travel habits will need to change to meet the targets. Businesses that are changing working practices as a result of the pandemic should also ensure that the change has the dual benefit of helping employees work and travel safely as well as contributing to a reduction in your organisation's carbon footprint. Doing this will help to avoid the pain and cost of future compulsory or legislative changes as the years tick by towards 2050. Some businesses in the South West are early adopters and have already implemented initiatives to change business travel behaviours as part of a wider strategic plan on emissions reduction. For others, the changes brought about by COVID-19 will be a springboard to begin developing that plan and capitalise on changes already made.

No matter where you already are in that transition here are some examples of steps that businesses across the South West are taking and potential

KPIs for incorporating these changes into a longer term route map to reduce organisational emissions:

- Create and commit to a new travel plan;
- Reduce unnecessary journeys;
- Encourage alternatives to vehicles, for example the government's Cycle to Work scheme; or
- Incentivise responsible travel, for example providing electric pool vehicles for the use of employees during work.

If you have any examples that you'd like to share, please get in touch. Collaboration as a business community will better enable us to navigate and overcome the challenges of COVID-19 and Paris Agreement targets successfully.

SPOTLIGHT ON: CORNWALL COUNCIL

The Council are accelerating their climate action plan as part of their COVID-19 recovery process. The Council reports that the pandemic has caused a 'transition to new ways of working in a manner unimaginable before the pandemic' and returning to business as usual would be a missed opportunity. The Council are aiming to be carbon neutral by 2030. The Council calculated a saving of 42,000 miles a day in commuting travel for its workforce during lockdown.

SPOTLIGHT ON: CITY SCIENCE

City Science is a young innovative tech company in Exeter, they have a Green Travel Plan that financially incentivises employees to use 'Active Travel' (walking or cycling) and public transport as an alternative to private vehicles for commuting. The incentives have been taken up by 54% of the workforce.

You can read the full article on the ICAEW South West [webpage](#).

SUSTAINABILITY EVENT - DATE FOR YOUR DIARY

For ideas and inspiration on how your business or indeed you personally can help the UK towards its 'net zero' goal then why not join us on Friday 6 November, 08:00 to 09:30.

Francesca Sharp, ICAEW Technical Lead, Climate Change will be facilitating a virtual event for the ICAEW South and South West Region. Further details will be announced shortly. Email Trudi (trudi.coles@icaew.com) to register your interest.

MERCIA CPD AUTUMN PROGRAMME – ENSURE YOU AND YOUR STAFF ARE KEEPING UP TO DATE

Mercia's face to face programme is currently being delivered by live streaming – '[Mercia Live](#)'

Topics include:

Family Tax Planning	Successful Fee Negotiations
Small and Micro Entity Accounting: Problems and Solutions	Compliance Update - The Essentials (AML, CFA and GDPR)
Autumn Tax Update	Business Tax Problem Areas
Charities: Current Issues	Current Issues in Property Taxation
Company Law for Accountants	IHT Tax Planning
VAT Update and Current Issues	Capital Gains Tax: Crucial Issues for the Practitioner

CONGRATULATIONS

To all our friends and colleagues who have reached the milestone of 50 years of membership

JANUARY 2020 - JULY 2020

Alan Baines	Nigel Edwards
Anthony Higgins	Peter Hodgson
Anthony Swainston	Peter Newman
Antony Blackler	Peter Riley
David Kirkness	Richard Brett
David Rogers	Richard Caistor
David Simpson	Richard Lewis
Eric Ainsworth	Robert Sandry
John Grontenrath	Robert Yates
John Hardcastle	Roger Smaridge
John Lyddon	Stephen Date
John Whiting	Terry Nickels
Jonathan Griffith	Warrick Butler
Keith Paddock	William Tolfree
Michael Berry	

OBITUARIES

It is with sadness that we mark the passing of our friends and colleagues:

Albert Clark	Mark Staddon
Alfred Stickland	Michael Lickiss
Clare Griffin	Peter Langmaid
David Davis	Richard Boxhall
Diana Young	Richard Parkinson
James Stewart	Richard Shaw
John Rudman	Robert Babb
John White	Thomas Gillingham
Kenneth Ivison	Timothy Clarke
Lawrence Hill	William Oxley

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Keep in touch

 [@ICAEW_SWregion](#)
For the latest news and events that affect you, from ICAEW Chartered Accountants South West and ICAEW generally.

 [ICAEW Chartered Accountants South West](#)
Network and discuss key messages with other chartered accountants in the South West.

[icaew.com/southwest](https://www.icaew.com/southwest)

For a complete listing of all ICAEW events and CPD courses or if you would like to be sent links to any of the above email Trudi Coles
trudi.coles@icaew.com