



Business Plan for 2007-10

1 Executive Summary

- 1.01 This Business Plan reflects a review of the Branch's present level of activity and service to the Institute and membership, with a view to increasing activity and improving services, including implementing new initiatives.
- 1.02 This review has carefully weighed realistically achievable actions against the longer term but more aspirational wishes as can be seen from the Programme and budget assessment shown in the Delivery Plan in Appendix C.
- 1.03 To date, various activities and events have run well, and economically. However, those that attend events or are in contact with the committee are mostly "regulars" and there is weak engagement with the greater proportion of membership.
- 1.04 The primary difficulty with which we are faced relates to the strung out geography of the region that has presented difficulties of poor contact with a scattered membership, and weak response to many CPD activities. These are seen as the key challenges for the Branch to address.
- 1.05 Additionally, career/business pressures on those who are actively involved, and travel distances, presents limitations on available time, and a further key target has to be recruitment of further members onto the committee or in support of it (e.g. co-option for tasks).

2 Review

- 2.01 The Branch identifies with and supports the "Corporate Strategy 1 - Vision and Objectives" membership consultation for the Institutes Corporate Plan for 2007-10.
- 2.02 Hitherto, the Branch committee has focussed on effectively applying limited voluntary and financial resources to serve the aims and needs of the Institute and Branch membership including efficiently managing its finances in accordance with the Institute's standing orders.
- 2.03 At September 2007 the Branch had 102 Members, 20 Affiliates and 3 Associates of which some 60% are in public service and some 40% are in private practice.
- 2.04 There is a reasonable spread of members across age ranges but it is felt that this will weaken if we do not appeal to potential younger intake.
- 2.05 Although a fair number of members also belong to other professional groupings adding to the collective knowledge and experience of the whole, little advantage is taken of this.
- 2.06 Administrative support and communications are good enabling effective circulation of CPD opportunities and early provision of information (for discussion) to the committee. In the short term, growth of membership is seen as unlikely to present problems.
- 2.07 The Branch last contributed an information page to the website in 2004 and has used the site to post forthcoming events it has not used it to disseminate information, or as an interactive forum.

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Review (cont)

- 2.08 Whilst current finances are adequate for the present level of activity, our aspirations for improvement will be dependent on that which can be reasonably afforded by the Institute.
- 2.09 The Branch committee has thus far been able to contribute with difficulty to consultations within the Institute but without much interest or support from membership. It is considered that the somewhat strung out nature of the region and poor lateral travel routes present cost and time issues that will always work against even the most stimulating of CPD opportunities, as attendances have demonstrated.
- 2.10 It is likely that the focus of many in the Branch area in public service that in the medium term the individual needs of members focuses on sustaining their careers rather than the greater good of the sector (survival) and that the profile of the historic environment can only be raised by the Institute (and other bodies) in a national drive with the Branches contributing to that process, rather than on a purely regional basis. This, therefore, falls outside the scope of this plan for the immediate future.
- 2.11 The extent to which the branch can fulfil training needs (including networking/engagement with membership) is limited by the status of many local authority members being relatively low in the LPA hierarchy which means that relevance is all important when deciding if time can be spent on training or attendance/involvement.
- 2.12 It is recognised that the Branch cannot itself meet all of its membership's CPD requirements, necessitating members needing to look to supplement their CPD needs by events organised by other bodies.
- 2.13 Little is known of the views of membership due to the low level of response to meetings (opportunities to meet).
- 2.14 A brief summary of the strengths, weaknesses, opportunities and threats presented to the Institute and this Branch (including membership) are outlined in the Market Analysis set out in Appendix A.
- 2.15 The resources available to the Branch are summarised in Appendix B.

3 Objectives

- 3.01 At a minimum, maintain the present level of service and efficiency as per item 2.02.
- 3.02 Secure means of achieving greater engagement with membership generally so that the Institute and this Branch committee can better represent their concerns, and to improve our knowledge of the membership.
- 3.03 Support the preceding item by ensuring more CPD opportunities (even if this necessitates repeating events in different areas), so that more members see the Branch as a primary source for their CPD needs.
- 3.04 By dissemination of information, encourage greater/wider input to debate on matters of County, RDA and similar policy initiatives and consultations.
- 3.05 By dissemination of information, encourage greater membership response and contributions to the Institute and its policies, and initiatives.
- 3.06 Seek opportunities to increase the influence of the Institute in the historic environment and the regard in which it is held.
- 3.07 Encourage others involved with the Historic Environment to join the Institute.
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4 Implementation

- 4.01 Effectively apply limited voluntary and financial resources to serve the aims of the Institute and the needs of Branch members.
- 4.02 Efficiently manage our finances in accordance with the Institute's standing orders.
- 4.03 Research views of membership & respond to needs (at meetings and by questionnaire).
- 4.04 Identify and recruit new members to the committee where additional capacity, talent, skills and/or experience are needed (by election, invitation or co-option).
- 4.05 Increase opportunities for members to meet via CPD events such as talks and visits.
- 4.06 Engage more with other Branches (e.g. London & South) as well as with professional bodies to reciprocally offer a greater range of CPD to membership, and also better inform wider issues influencing the historic environment.
- 4.07 Make use of the website as a means of reaching membership to disseminate information and seeking of views, advertising and reviewing events and being more visible to anyone visiting or browsing the site.
- 4.08 Set realistic and achievable goals, budgets, and timescales. Please see the costed Delivery Plan in Appendix C

Appendices

- A Market analysis
- B Summary of resources
- C Delivery Plan (costed)

This Business Plan was approved at the South East Branch Annual General Meeting on 20th October 2007.

David Kincaid
Chairman, South East Branch