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EXECUTIVE SUMMARY

Background

This report details the findings, conclusions and recommendations of the Branch Strategy Review (BSR). The Review was initiated by the Institute’s Chief Executive at the end of 2009. Its overarching aim is to critically examine the current UK Branch Network to determine if it remains ‘fit for purpose’ and serves the needs of the Institute’s UK Membership and, as a result, to make appropriate recommendations for improvement.

The Review was undertaken over a four month period by a team of ten volunteers representing Branches across the UK, chaired by a Past President, and supported by two CIPS staff members.

Information Gathering

A priority for the team was to gather up-to-date, factual information to provide a firm basis upon which to objectively undertake its analysis and, from that, develop its conclusions and definitive recommendations in order to deliver against its remit. To accomplish this, a variety of sources was employed, including the CIPS internal database, on-line questionnaires and face-to-face discussions, together with the considerable experience and knowledge of the individual team members.

A tailored on-line membership questionnaire proved to be a particularly rich source of information. This was issued to 8,000 UK members and completed responses received from 10% of the recipients. As such, it is judged that a high degree of confidence can be placed in the results of the questionnaire which are detailed in the report.

In addition, the Chartered Institute of Personnel and Development (CIPD) has recently undertaken a very similar review of its branch network and with essentially the same remit as the BSR. The full results and recommendations of this review were generously made available by the CIPD to the BSR team and proved to be extremely valuable input in developing its thoughts and recommendations.

Findings and Conclusions

The key findings and conclusions emerging from the various information sources employed can be summarised as follows:

• There is not any immediate imperative to restructure the existing Branch geographic groupings. The challenge is to revitalise – rather than restructure - the Branches, such that they are seen as relevant by members in being able to recognise, appreciate and appropriately respond to their needs locally and in a readily accessible manner.

• Branches need to expand their vision from, typically, ‘event delivery’ to more effectively understanding and responding to local members’ needs.

• The role, purpose and ‘deliverables’ of Branches are unclear to both members and Branches themselves.
• There is also lack of clarity in terms of relationships between members and their Branches, Branches, their members and Easton House and Branches and their elected Council Members. This lack of clarity includes ‘who’s responsible for what’ and ‘who does what’.

• Communication with members on local issues and activities is perceived as inadequate. As a result, members believe that they are not kept advised of what is happening in their Branches and, as a result, can feel dissociated and uninvolved.

• There is support for both local events and networking which are currently provided by the Branches. However, the inherent strengths of the Branch network are not being fully utilised to more fully deliver the benefits the Institute is able to offer its UK members.

Members have clearly identified the benefits they find of particular value and also how they want them to be delivered through, primarily, a mixture of local and electronic channels.

• There is a strong push from members for CPD, delivered locally.

• Branches need to play a more effective role in attracting, welcoming and integrating new members – particularly students and younger ‘recruits’.

• The recently available results of the Triennial Membership Survey are fully consistent with the BSR data analysis and complement and reinforce the BSR’s findings and conclusions.

Recommendations

The findings, conclusions and recommendation of the BSR should be widely promulgated and effectively communicated to all Branches and their memberships through a variety of channels as soon as possible. These communication channels are detailed in the report.

The nine recommendations of the Review are summarised below in their order of relative importance:

1. The purpose of the Branch needs to be restated to clearly reflect its future role in being a primary agent in responding to members’ needs at a local level. A recommended Branch Purpose Statement is included in the report which should be:
   • Formally agreed and adopted by the Institute.
   • Rolled out and effectively communicated to all Branches as soon as possible.

2. Recognising the strong ‘push’ from members for Continuing Professional Development (CPD), the Institute should:
   • Clearly articulate its support for and the importance to members of CPD.
   • Develop and implement a strategy targeted at enhancing the relevance and importance of CPD by employers.
   • Deliver more local CPD related activities and implement a simple on-line tool to enable members to easily record their CPD experiences.
   • Ensure that gaining CPD experience is linked to active participation in Branch activities.
3. There is a need for a clearly identified ‘Branch Champion’ at a senior executive level within the Easton management structure to:
   - Be responsible and accountable for ‘Branch relationship management’ and which should be communicated and evident to all Branches and the membership at large.
   - Be responsible for implementing the recommendations of this Report and monitoring and reporting on progress.
   - Be responsible for the ongoing development of Branch Strategy.

4. Branches should be – and be seen to be - a primary channel for member engagement at a local level. This will require Easton developing, making available and maintaining a range of communication and engagement channels and tools which can be ‘owned’ by Branches and tailored to meet local needs.

5. The existing available resources at Easton will not be sufficient to service the future needs of the Branch network. Support for the Branches must be critically reappraised in order to ensure sufficient resources and expertise is put in place to ensure Branches have the ability to deliver against the proposed Branch Purpose Statement.

6. In order to enable Branches to deliver the benefits to their members in line with the Purpose Statement, a small number of ‘easy to use’ support and analytical tools (identified in the report) should be developed by Easton and trained in for general use by all Branches.

7. Branches should assess and report their performance annually against delivery of the key components of the Branch Purpose Statement. Branch Budget funding should appropriately reflect this performance.

8. The role and effectiveness of Elected Council Members as a two-way communication channel between Council, Branches and members needs to be reinforced.

9. The existing Branch governance structure should be critically examined and reappraised to simplify, modernise and ‘streamline’ its operation.

This Report

This report has been developed by and enjoys the support of the full BSR Team. It is anticipated that its recommendations will be incorporated, as appropriate, in the Institute’s three year Business Plan.
1: BACKGROUND AND TERMS OF REFERENCE

1.1 Background and Aims

The Branch Strategy Review (BSR) was commissioned by the Institute’s Chief Executive in late 2009 in response to ongoing feedback from the Branches in terms of, inter alia:

- Growing frustration at Branch level in the inability to ‘engage’ the majority of the membership.
- Poor attendance at many branch events, despite the considerable time and effort put in by Branch Committees and, as a result, the high quality of speakers/events offered to members.
- A lack of understanding of the real needs of local members in today’s environment and how best to respond to these.

The overarching aim of the Review is to examine the current UK Branch Network to determine if it remains ‘fit for purpose’ and serves the needs of the Institute’s UK Membership.

It is anticipated that the output of the Review will provide a valuable contribution to the development of the Institute’s three year Corporate Strategy and management plans.

1.2 Terms of Reference

The Review’s full Terms of Reference are provided in Appendix 1 and can be summarised as:

- The Review would be undertaken by a team of volunteers from Branches across the UK and which comprised:

<table>
<thead>
<tr>
<th>Name</th>
<th>Branch</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Branch Representatives</strong></td>
<td></td>
</tr>
<tr>
<td>Roger Keeling</td>
<td>Chair and Derbyshire Past President</td>
</tr>
<tr>
<td>Steve Brown</td>
<td>Northumbria</td>
</tr>
<tr>
<td>Graham Collins</td>
<td>Central London</td>
</tr>
<tr>
<td>Brian Hardacre</td>
<td>Cheshire and North Wales</td>
</tr>
<tr>
<td>Dorothy Holland</td>
<td>Kent</td>
</tr>
<tr>
<td>Kate Parker</td>
<td>Devon and Cornwall</td>
</tr>
<tr>
<td>Peter Parry</td>
<td>Northampton</td>
</tr>
<tr>
<td>Malcolm Taylor</td>
<td>Yorkshire</td>
</tr>
<tr>
<td>Chris Wigby</td>
<td>Sussex</td>
</tr>
<tr>
<td>Phil White</td>
<td>Central London</td>
</tr>
<tr>
<td><strong>CIPS Representatives</strong></td>
<td></td>
</tr>
<tr>
<td>Carol Husband</td>
<td>UK Membership Officer</td>
</tr>
<tr>
<td>Kevin Hickman</td>
<td>Networks Manager</td>
</tr>
</tbody>
</table>
• The key objectives to be delivered by the Review are:

  - To clearly identify what Members want of CIPS in their local region through the collection and analysis of relevant intelligence, information and data via whatever channels are deemed appropriate by the Team.

  - As a result of this analysis, identify issues which inhibit or prevent the Institute meeting its members’ needs locally. This should include consideration of the existing Branch structure and organisation.

  - Via a final report, to make appropriate and specific recommendations for action which can then be included in the new three year CIPS Corporate Strategy?

• The BSR Team is to focus upon the current UK Branch Network. Any outcomes may be considered for International Branches.

• The final Report, on behalf of the team, should be delivered to the Institute’s management by the end of May 2010 to enable its findings and recommendations can, as appropriate, be reflected in the Institute’s three year Business Plan.

1.3 Current Branch Operation

1.3.1 Structure

There are currently 45 established Branches to meet the local needs of the Institute’s 28,460 UK members. Of these, 34 are ‘active’, with 11 ‘moribund’ i.e. the Branch constitutionally exists but is inactive, having no Branch Committee and programme of activities. Members in the geographical areas represented by these moribund Branches, therefore, have no local focus or representation.

The UK is divided into ten geographical areas and individual Branches assigned to the appropriate area (see Appendix 2A).

1.3.2 Governance

The Role of the Branch

The role of the Branch is described in the ‘Branch Handbook 2008’ as:

  - To provide a focus for member support in geographical areas.

  - To manage a programme of activity that will be of professional benefit to members leading to enhanced membership value through networking and other learning opportunities. To promote the professional and other benefits of membership with a view to raising the profile of the Institute locally and thereby recruiting new members.

  - To develop relationships at local level with other professional bodies, businesses and colleges.

The ongoing operation of each active Branch is the responsibility of the elected Branch Committee, reporting to the Branch Chair, which meets regularly throughout the year. Typically, the Branch
Committee will comprise a Chair, Secretary, Treasurer, Education Officer, PR Officer and a number of co-opted members. As such, there are around 200 members voluntarily serving on Branch Committees.

Individual Branches submit an Annual Business Plan, detailing their proposed programmes for the coming year. This forms the basis for the central allocation of Branch Budgets. The total budget available for allocation to Branches is £60k.

An important feature of the Branch Committee’s efforts is to develop and manage an annual programme of events and activities for its members. Attendance at such activities provides an insight into the level of local involvement of our UK members. In 2008/9, there were 123 Branch events which were attended by a total of 3239 members. On average, a local Branch event attracted an attendance of 26. This means that just 11% of the Institute’s membership attended and were actively involved in Branch events. In fact, the percentage is likely to be considerably below this level since the same members will have attended several events. In 2009/10 to date, 63 Branch events have been held, with an average attendance of 23.

**Elected Council Members**

The Institute’s Charter establishes the right of every corporate member to be represented at national level. This is achieved via the appointment of Elected Council Members for identified ‘sub-divisions’ through direct election by members. There are 11 geographical sub-divisions (e.g. Scotland, East Central, South West etc) and 13 business sector sub-divisions (e.g. Manufacturing, Local Government, Construction etc). Each sub-division is represented by one or two Elected Council Members, voted in by members of the particular sub-division for a three year term of office.

The ‘Role of Elected Council Members’ is detailed in the Branch Handbook 2008 which, inter alia, states that Elected Council Members should:

“Communicate with the sub-divisions they represent either by attending branch or branch group pre- and post-Council meetings, by issuing e-mailed or postal newsletters or by contacting branch group officers.”

A key responsibility of an Elected Council Members should, therefore, be to act as an effective two way communication channel between Council and the Branches and members he/she represents.

1.3.3 **Support**

Support to Branches is provided by two staff members at Easton House, namely: the UK Membership Officer and the Events Administrator.

The UK Membership Officer reports to the Head of Membership and thence through the Director of Business Solutions to the Chief Executive (see CIPS organisation charts, Appendix 2B).

A number of initiatives, procedures and tools has been recently developed and made available by Easton, mainly as a result of discussions with Branch Chairs in late 2009, in order to assist the work of Branch Committees. The following table details these and also shows the ‘take up’ by Branches:
<table>
<thead>
<tr>
<th>Tool/Procedure/Initiative</th>
<th>Take-up/usage by Branches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Huddle – a secure on-line portal where everything a Branch would need is stored</td>
<td>30%</td>
</tr>
<tr>
<td>Education Liaison Officers’ Training Day</td>
<td>25%</td>
</tr>
<tr>
<td>Branch Diary – cancelled through lack of use</td>
<td>30%</td>
</tr>
<tr>
<td>Branches to review/update web page</td>
<td>30%</td>
</tr>
<tr>
<td>Branch Business Plans – submissions by deadline</td>
<td>30%</td>
</tr>
<tr>
<td>Branch Newsletter</td>
<td>‘Handful’</td>
</tr>
<tr>
<td>Mid-monthly mailing</td>
<td>Increase in bookings since mid March start</td>
</tr>
<tr>
<td>Branch Event Kits discontinued in Jan - £3k saving</td>
<td></td>
</tr>
</tbody>
</table>

As can be seen, the take-up and use of the available tools by Branches is around 30%.
2: METHODOLOGY AND DATA GATHERING

2.1 Information Gathering

A priority for the Team was to gather up-to-date, factual information to provide a firm basis upon which to objectively undertake its analysis and, from that, develop its conclusions and definitive recommendations in order to deliver against its remit. To accomplish this, the following sources were employed:

- In-house CIPS data, made available via Huddle and accessible to all Team members.

- The knowledge within the Team itself. The team members represented nine different Branches, a quarter of those currently active. As such, the Team had considerable experience and understanding of both their local membership’s views and how Branches currently operate, ‘warts and all’.

- Three tailored questionnaires:
  - An on-line Membership Questionnaire.
  - A questionnaire for use at two Regional Events.
  - A questionnaire/aide memoire for use in the workplace.

- The Chartered Institute of Personnel and Development (CIPD). The CIPD has recently undertaken a very similar Branch focused review and implementation of its recommendations is currently underway. The CIPD very kindly made available its findings, conclusions and recommendations which the Team has found extremely valuable in the development of this Report.

How the data was collected from the above information sources is summarized below and the resultant findings and conclusions discussed in following Section 3 of the report.

2.2 The on-line Membership Questionnaire

A 10 question questionnaire, developed by the team (see Appendix 3A), was issued electronically to some 8000 UK members, which included all Branch Committee members. This represents almost 30% of the total UK membership.

Of the recipients, the questionnaire was read by one third (2593) and 841 completed questionnaires (9.8% of those issued) were returned.

It is judged that a high degree of confidence can be placed in the results of the questionnaire because:

- The return rate of 9.8% proved to be extremely close to the 10% predicted which would deliver statistically reliable data.

- The profile of the respondents closely matched that of the total UK membership in terms of membership grade, age, gender and employment sector – see Appendix 3B. Full (MCIPS)
members accounted for 53% of the respondents, with students accounting for 20% and the balance of 27% spread across the other membership grades.

A detailed numerical analysis of the responses to the multi-choice questions is provided as Appendix 3C.

Two questions, 9 and 10, required free form text responses. The two questions were:

Question 9: ‘What further activities/benefits would you like CIPS to offer and how would you like these to be delivered?’

Question 10: Are you happy with your level of involvement with CIPS? If you answered no, what do we need to do to encourage you to participate more?’

Analyses of the responses to these two ‘open’ questions are provided in Appendices 4A & 4B.

2.3 Regional Events

The aide memoire developed to gain members’ feedback at two Regional Events (see Appendix 4A) which was employed at the Regional events held in Bristol (on 25 March) and Manchester (on 22 April).

Six responses were obtained at Bristol and ten at Manchester...

2.4 Workplace Feedback

A questionnaire was also developed in order to encourage discussion and feedback from members in the workplace (see Appendix 4B). This was employed in two ways:

- For individual face to face individual workplace discussions with the 8 CIPS members within the Devon and Cornwall Police Force.
- As an on-line questionnaire issued to 150 CIPS members within the Department for Work and Pensions, based in Leeds and Sheffield.

The results from these two initiatives were extremely valuable in very much supporting and confirming the findings of the on-line Membership Questionnaire (see 2.2 above) rather than yielding any major new insights.

2.5 CIPD Experience

The CIPD has recently completed a very similar review to our own BSR, entitled ‘The Future of Branches’. It was initiated by a new, incoming CEO who faced almost identical challenges and issues associated with the CIPD branches as those which initiated the CIPS Branch Strategy Review.

The CIPD review was undertaken by a working party comprising eight branch representatives from across the UK and three corporate staff members. Implementation of the recommendations of the review is now underway.
An overview comparison of CIPS and CIPD is:

<table>
<thead>
<tr>
<th></th>
<th>CIPS</th>
<th>CIPD</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK Membership</td>
<td>28,460</td>
<td>126,687</td>
</tr>
<tr>
<td>Annual Turnover</td>
<td>£15.9m</td>
<td>£30m</td>
</tr>
<tr>
<td>Number of active UK Branches</td>
<td>34</td>
<td>47</td>
</tr>
<tr>
<td>Cost of supporting Branches</td>
<td>£110k</td>
<td>£1m</td>
</tr>
<tr>
<td>Average attendance at Branch events</td>
<td>11%</td>
<td>16%</td>
</tr>
</tbody>
</table>

It should be noted that CIPD branches generate revenue (for example, by charging for events) which is used to offset the £1m per year branch support costs.

Two members of the BSR team spent a day with Cheryl Myles, Head of Branch Development within CIPD and who was a member of the ‘The Future of Branches’ Working Party. At this, the full findings, conclusions and recommendations of the CIPD review were openly shared with us.

The information from the CIPD review felt to be relevant to inform the BSR is summarised in Appendix 6.
3: FINDINGS

As a result of collating and analysing the results and input from all the information sources, the key findings of the BSR Team are detailed below. Percentages, where quoted, represent the proportion of the respondents to the on-line Membership Questionnaire. In addition, as a result of the various findings, future opportunities for Branches are highlighted which are also reflected in the Report’s Conclusions and Recommendations (Sections 4 and 5).

1. Professional qualifications are the primary motivator for joining CIPS and remaining a member

80% of members said that they initially joined the Institute to gain a professional qualification and continue to remain as members for the same reason. ‘Support for career’ came second as a reason for initially joining, being judged as ‘very important’ by 55% of members.

Branch Opportunity:
- Enrich the career support available to local members as part of their membership benefits.

2. The relative importance of on-going benefits were identified

Ongoing benefits which members value most, in priority order, very much reflect the reasons for initially joining, namely:

- Maintaining professional qualifications (77%).
- Keeping up to date (70%).
- Access to good practice and a full range of professional tools (65%).
- Networking to share ideas/best practice and to make new contacts (60%).
- Availability of leading edge thinking (55%).
- Support for career (55%).

The three clear leaders in terms of benefits actually taken advantage of by members during 2009 were:

- Keeping up to date (60%).
- Maintaining professional qualifications (50%).
- Access to good practice (50%).
Attendance at CIPS and Branch events came in fourth (40%).

Note that in the DWP on-line questionnaire, almost two thirds of respondents declared that they had not participated in any Branch, Regional or National events during the previous year.

### Branch Opportunity:
- Showcase knowledge and skills and the application best practice procurement techniques.
- Provide an opportunity for professionals to meet and network with each other.

3. There are clear preferences expressed for ‘delivery channels’

Members displayed clear preferences in terms of how they wish to have their membership benefits delivered by the Institute:

<table>
<thead>
<tr>
<th>Preferred Delivery Channel</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-line</td>
<td>Access to good practice</td>
</tr>
<tr>
<td></td>
<td>Access to a full range of professional tools</td>
</tr>
<tr>
<td></td>
<td>Keeping up to date</td>
</tr>
<tr>
<td></td>
<td>Maintaining professional qualifications</td>
</tr>
<tr>
<td></td>
<td>Availability of leading edge thinking</td>
</tr>
<tr>
<td>Locally</td>
<td>Events</td>
</tr>
<tr>
<td></td>
<td>Networking to share ideas/best practice and to make new contacts</td>
</tr>
<tr>
<td></td>
<td>Training courses</td>
</tr>
</tbody>
</table>

### Branch Opportunity:
- Build the capacity of the Branches to deliver a broad range of events that have strong professional appeal to local members.
- Develop a range of delivery channels to facilitate and encourage membership interaction and easy access to resources.
- Use Branch events as low cost training (or subject matter introductions) to complement commercial training.

4. General support is expressed for Branches ……

Members’ comments reflected general support for Branches. Only one respondent to the Membership Questionnaire expressed a strongly held alternative view:

‘I think it’s time to wind up the branches. From what I gather, they are mostly poorly attended and are outmoded.’
Although not specifically addressed, the current shape and structure of the Branch network was not raised as an issue or a concern by members.

It is also of interest to note that research by CIPD indicated that no major professional institute has decided not to continue with its network of local branches.

5. **Branch Opportunity:**

- Build on the strengths of having an ‘on-the-ground’ professional presence in most parts of the UK
- Make the Branches’ purpose clearer.
- Develop a stronger local profile and representation - particularly to local academic institutions, professional bodies and major employers.

5. **... but members also identify key problems and concerns**

While there is support for Branches, members clearly identified problems in the following key areas:

5.1 **Clarity of Role:** There is a lack of clarity and understanding amongst members as to a Branch’s current role and remit. Perceptions range from the Branch simply as a deliverer of a number of member events during the year to a far wider remit in actively engaging with its membership and responding to members’ needs at a local level.

There is also evidence of confusion amongst members in terms of:

- Their own relationships with their Branch and Easton in terms of ‘who does what’ and ‘who’s responsible for what’.
- The relationship between the Branch and ‘corporate CIPS/Easton’.

5.2 **Communication:** There was criticism about the lack of effective, timely communication between Branches and their members. Quotes from the Membership Questionnaire responses provide a ‘feel’ for members’ views:

- ‘I am not really aware of what the local branch is - other than the occasional branch event on specific topics’
- ‘How can I participate and be more involved in CIPS, I don’t know anything?’
- ‘More involvement at branch level, very little communication at present’

In the DWP workplace survey, only 56% of its members claim awareness of the Branch network while 18% do not know how to make contact with it.

5.3 **Support:** Concerns were voiced about the perceived level of practical support for Branches from Easton:
• ‘It's minimal involvement as I’m not entirely happy with the lack of support (from Easton) available’

• ‘I am actively involved as Branch chair. However, the Institute appears to have given little priority to Branches e.g. as evidenced by the level of Branch support available from Easton. CIPS needs to reaffirm the importance and role of Branches and match this with appropriate resources, support, systems and guidance centrally’

• ‘More support for the branch network; this is woefully inadequate and over bureaucratic. Stamford has to stop trying to control everything’

6. A high proportion of members appear satisfied with their level of engagement

When asked in the on-line Membership Questionnaire, ‘Are you happy with your level of involvement with CIPS?’ 73% of respondents answered ‘Yes’.

Those who claimed not to be happy stated that they were seeking:

• Much improved Branch related communication and information (see 5.2 above).

• More relevant, interesting and exciting local events.

In fact, many event related comments and suggestions – sometimes contradictory – were voiced during the information collection activities, including:

- Difficulties in attending planned Branch events because of timing, location (particularly in Branches with a large geographical ‘spread’ e.g. Devon and Cornwall) and family commitments.

- Calls for more local events e.g. such that ‘more national issues can be discussed locally’, ‘can act as training events and also useful for networking’.

- Suggestions for more on-line activities and webinars to offset the need for travel time and expenses.

- Ensuring that local events reflect the needs of the particular Branch membership:

**Branch Opportunity:**

- Create a role and purpose statement for Branches so that their remit is clear to everyone.
- Develop a stronger direct relationship between each Branch and its members, including direct communication
- Clarify the role of Easton House with respect to the role and purpose of and its support for the Branches.
‘My local branch is totally dominated by public practitioners. They look with disdain on private sector buyers’

‘Locally organised events aimed at SMEs - all events and subjects are aimed at large companies; very little is offered in any way to those operating at SME level’

‘There are no events etc local to my area that are relevant to my job’

‘More activities that are not branch-centric, with timings to suit work/life balance and the same people are not constantly involved’

7. Over 50% of members are interested in Continuing Professional Development (CPD)

In the on-line Membership Questionnaire, over half of the respondents expressed an interest in CPD. From these, three clear messages emerged:

• The Institute needs to:
  1: More actively encourage employers to recognise the importance of CPD.
  2: Give more recognition to CPD itself.

• The need for an on-line tool to easily capture and record members’ CPD activities.

• Local workshops, seminars and conferences to deliver CPD.

8. Do not neglect younger members and students

Feedback indicates that Branches need to be far more active in welcoming and engaging new – particularly younger – members. As one respondent noted:

Branch Opportunity:
• Develop a better understanding of membership and local market needs and key stakeholders.
• Link Branch activities to identified local engagement priorities and membership needs.
• Provide a local voice for members so that their needs can be effectively represented to CIPS - and vice versa.
‘Branch events are sometimes quite daunting to attend as a newcomer. How about CIPS providing Branch Secretaries with student contact info and asking them to attend events and welcome them into the group’

Comments signalling lack of local support for students in particular included:

‘CIPS should fully consider the views of its members and try to meet a higher standard of customer care. In too many situations the Institute is viewed purely as a money making machine and not as a support mechanism for its student population’

‘Support and mentoring for students and events to engage, promote and encourage engagement. Support with career development. By being more involved as a student would encourage participation once MCIPS achieved’

The importance of ‘first contact’ was raised and recognised by the Team. The experience of a student or new member in their first contact with CIPS – either via Easton House or their local Branch – could well influence an individual’s perception of the Institute and whether further engagement is sought and maintained.

**Branch Opportunity:**

- Improve the member introduction process to include a personalised Branch ‘welcome’.
- Develop stronger links between Branches and local academic and educational groups.
- Consider the needs of students and new members to encourage better support and professional mentoring.
4: CONCLUSIONS

The following key conclusions are drawn by the BSR Team from its various information sources and drive the Report’s Recommendations (see Section 5):

4.1: We do not see any immediate imperative to restructure the existing Branch geographic groupings.

The current Branch network structure was not raised as an issue or a concern via the responses to the questionnaires or in various workplace and Regional Event discussions. In fact, there was general support expressed for both local events and networking, as currently provided by the Branches. It is also worthy of note that, as far as we can ascertain, no professional institute has as yet chosen to dispense with its branch network.

We believe that the concept of a Branch network to satisfy the needs of the Institute’s membership at a local level remains both valid and appropriate. The challenge we face is to revitalise – rather than restructure - the Branches, such that they are seen as relevant by members in being able to recognise, appreciate and appropriately respond to their needs locally and in a readily accessible manner.

The recommendations by the BSR Team (Section 5) are designed to address that challenge and provide, we believe, an opportunity for the Institute to re-engage with its membership.

4.2: Branches need to expand their vision from, typically, ‘event delivery’ to more effectively understanding and responding to local members’ needs.

4.3: The role, purpose and, hence, ‘deliverables’ of Branches are unclear to both members and Branches themselves.

4.4: There is also lack of clarity in terms of relationships between:

- Members and their Branches.
- Branches and their members and Easton House.
- Branches and their elected Council Members.

This lack of clarity includes ‘who’s responsible for what’ and ‘who does what’.

4.5: Communication with members on local issues and activities is perceived as inadequate. As a result, members believe that they are not kept advised of what is happening in their Branches. This can result in members feeling dissociated and uninvolved.

4.6: There is support for both local events and networking which are currently provided by the Branches.
In addition, 73% of members said that they were happy with their level of involvement with the Institute.

However, we believe that the inherent strengths of the Branch network are not being fully utilised to deliver the benefits the Institute is able to offer its UK members.

Members have clearly identified the benefits they find of particular value and also how they want them to be delivered through, primarily, a mixture of local and electronic channels.

4.7: There is a strong push from members for CPD and they have very clearly articulated what they are looking for from the Institute, namely to:

- More actively encourage employers to recognise the importance of CPD.
- Give more recognition to CPD itself.
- Increase local delivery of CPD.
- Deliver an on-line tool to easily capture and record members’ CPD activities.

4.8: Branches need to play a more effective role in attracting, welcoming and integrating new members – particularly students and younger ‘recruits’.

In addition, Branches could offer students far more local support in terms of, for example, ensuring on-going contact, provision of guidance/mentoring from senior practitioners etc.

4.9: CIPD’s ‘The Future of Branches’ review addressed very similar issues and challenges as those faced by CIPS. As such, many of its findings, conclusions and recommendations are relevant to our own Institute and have provided extremely valuable input to the BSR Team’s thinking and the development of this report.

We would wish to formally thank CIPD for both their ongoing interest and support and the openness with which they shared the details of ‘The Future of Branches’ review with the BSR Team.

4.10: The recently available results of the Triennial Membership Survey are fully consistent with the BSR data analysis and complement and reinforce the BSR’s findings and conclusions.
5: RECOMMENDATIONS

Based upon its research and analysis, the Branch Strategy Review Team’s recommendations are detailed in this final section.

Communication of the Report

We propose that the findings, conclusions and recommendation of the BSR should be communicated to all Branches through:

- Initially, direct communication with Branch Chairs. This is already planned, with feedback on the output of the BSR scheduled as the main agenda item at the Branch Chairs meeting on 11 June.

  This feedback should also include the Institute’s views on:

  - Its support for the output of the BSR.
  - How the BSR findings, conclusions and recommendations will be integrated into the Institute’s 3 year Business Plan.
  - How it plans to both implement the BSR recommendations and to monitor and report on implementation progress to the membership.

  A ‘communication pack’ should be available for Chairs to take away from the day to facilitate timely feedback to and discussion within their individual Branches.

- Supply Management.

- The CIPS website, following review of the Report by the Chief Executive.

Recommendations

Recognising that the expectation is that the Report’s recommendations will be incorporated, as appropriate, into the Institute’s three year Business Plan, their proposed implementation timing has been prioritised as:

- **Priority 1: Do in Year 1 (November 2010 to October 2011)**

- **Priority 2: Do in Year 2.**

- **Priority 3: Do in Year 3.**

PRIORITY 1

5.1: The need for a ‘Branch Champion’ at Easton

A nominated senior executive within the Easton management structure, and directly reporting to the Chief Executive, should:
• Be clearly responsible and accountable for ‘Branch relationship management’. This personal accountability should be communicated and evident to all Branches and the membership at large.

• Be responsible for implementing the recommendations of this Report.

• Be responsible for the ongoing development of Branch Strategy.

• Make an annual stewardship report on the ‘state of the Branches’ and progress against the BSR recommendations. This should be made available to all Branches and members and, as appropriate, to the Board of Management and Council.

5.2: The Role and Purpose of the Branch

There is considerable lack of clarity on the:

• Role, purpose and ‘deliverables’ of Branches.

• The various relationships between members, Branches, Elected Council Members and Easton House in terms of ‘who is responsible for, and who does what’.

The first point of contact for a new member should continue to be via Easton House, with the Branch being the primary agent in responding to members’ ongoing needs at a local level. We recommend that the following Purpose Statement is adopted to reflect this Branch role:
The Purpose of the Branch

1. To provide a local Professional Network

   Branches should be a primary channel for member engagement at a local level in order to:
   - Provide a supportive infrastructure for effectively sharing information, experiences and best practice.
   - Act as a point of contact for providing guidance, advice and mentoring for members requiring or seeking support.
   - Understand and proactively respond to members’ local needs.

   Branches will employ a range of available communication channels to best reflect and respond to the particular needs of its members.

2. To provide a local conduit for Council, Branches and Members

   The Branch will provide an effective two-way channel to link its members with their Elected Council Member and through them, to Council itself. In doing so, Branches will actively assist Elected Council Members to fulfil their responsibility to engage with and support the Branches they represent.

3. To promote representation, visibility and engagement in the local environment

   The Branch should engage with local business and academic communities in order to:
   - Encourage better understanding - and enhance the profile - of the profession.
   - Promote the Institute, its role, relevance and goals and, thereby, actively encourage the recruitment of new members.
   - Gain a fuller understanding of local needs for CIPS products and services.

4. To develop relationships between Member and Branch

   The Branch should be seen by its members to be a primary channel for local communication which should:
   - Facilitate a better understanding of local members’ needs such that Branch priorities and activities can be ‘tailored’ to respond to these.
   - Encourage members to feel a more important, relevant and integral part of ‘their’ Branch and its activities.
   - Make new members feel more welcome and ‘valued’ through direct and ongoing personal contact from the time the individual joins the Institute and, thereby, becomes a Branch member.

5. To facilitate local sharing of Knowledge and Best Practice

   The Branch should provide a forum which actively contributes to and facilitates the sharing of knowledge and experience amongst CIPS members at a local level.

   By actively facilitating a ‘community of practice’, the Branch should actively support the ongoing delivery of Continuing Professional Development (CPD) for the benefit of its membership.

6. To ensure alignment with CIPS strategy

   CIPS forward strategy and Business Plan should be clearly and effectively communicated to all Branches to ensure both local understanding and commitment. The Branch, in turn should:
   - Align its activities and mobilise volunteers from amongst its membership to support the delivery of the Institute’s goals and strategy.
   - Produce an annual Action Plan that delivers value for money and which includes measurable KPIs.
This Purpose Statement should be:

- Formally agreed and accepted by the Institute.
- Rolled out and effectively communicated to all Branches. This should be achieved via face to face, personal communication at individual Branch level. It is essential that commitment is secured from all Branches through ensuring that the rationale for the Purpose Statement, its implications and practical application are fully debated and clearly understood.

5.3: Support

Branches will need considerable ongoing support, advice, guidance – and encouragement - to enable them to deliver against the proposed Purpose Statement. We believe that the currently available resources at Easton will be inadequate to provide this level of support. It is, therefore, recommended that support for the Branches at Easton should be critically reappraised in order to ensure sufficient resources and expertise are made available to fully service the future needs of the Branch network. This will require the capability to provide a range of services, namely:

- Offering Branches effective - and, as appropriate, face-to-face - advice, guidance, support and coaching.
- Assisting in building necessary competencies and skills at Branch level.
- Developing and training in support tools, documentation and templates e.g. Self Assessment, Performance Measurement, Engagement Toolkit, Branch Introduction etc.
- Effectively supporting and monitoring the ongoing implementation of this Report’s recommendation.

Based upon CIPD’s experience, careful consideration should be given to the appropriate relationship model between this central support resource and the Branches it serves.

Note: For information, CIPD’s ‘The Future of Branches’ review recommended a de-centralised structure via ‘hubs with local networks’. This required the appointment of 8 local ‘Branch Co-ordinators’ to support 6 branches each. In order to strengthen relationships between these support staff and ‘their’ Branches, it was decided that the Co-ordinators should report to their allotted Branch Chairs on a day-to-day basis, with a dotted line to the (central) Branch development Manager.

5.4: Preparing to Deliver

In order to enable Branches to deliver the benefits to their members in line with the Purpose Statement, we recommend that:

- Each Branch should think through what actions it plans to take in order to enable it to deliver against the Branch Purpose Statement. These actions should be captured in an individual, concise Branch Action Plan which will specifically reflect:
• The differing business and social environments in which the Branches operate.
• Differing membership demographic and geographic considerations.
• Differing membership needs and aspirations.

The aim of the Action Plan is to encourage and assist Branches to more clearly identify their forward programme and priorities in a structured via a simple, ‘user friendly’ template (see Action Planning Guide below).

• In order to be able to develop such a plan, we believe that most Branches will probably require some guidance and support. As such, we recommend the development of the following two aids:

  • A Self Evaluation Tool to enable a Branch to objectively assess its current operation and deliverables against the key components of the Purpose Statement i.e.:
    - Provision of a local Professional network.
    - Provision of a local conduit for Council, Members and Branches.
    - Promoting representation, visibility and engagement in the local environment.
    - Developing stronger relationships between Member and Branch.
    - Facilitating a local sharing of Knowledge and Best Practice.
    - To ensure alignment with CIPS strategy.

As a result, to then be able to clearly highlight any ‘gaps’ and identify what further guidance and support it feels it needs to address these and, hence, more effectively deliver against the Purpose Statement. Addressing any such ‘gaps’ may involve necessary training and competence building within the Branch itself. The Tool should also provide the opportunity to ‘benchmark’ against other Branches and, hence, help to share best practice and experiences.

Note: Such a tool has been developed and is being employed by the CIPD as an integral part of its ‘Future of Branches’ implementation programme.

  • An Action Planning Guide to provide Branches with guidance (and an appropriate simple to use template(s)) covering the various areas which should be addressed in developing their own Branch Action Plan.

Needless to say, it will be essential that the above tools and templates are both designed to be – and ‘sold’ as – supportive and user friendly aids for Branches.

• Branches should be made familiar with the purpose and application of both of the above tools through face to face communication and guidance by Easton.

Branches should have had the opportunity to use the Self Evaluation Tool and, as a result, develop their first Action Plan by the end of May, 2011.

• Thereafter, Branches should review, update and advise their Action Plan annually.
PRIORITY 2

5.5: Communication and Engagement

Branches should be – and be seen to be - a primary channel for member engagement at a local level. As such, our recommendations are:

Communication:

- Branch-to-member communication must be seen by members to be from their Branch itself not via Easton. For example, invitations to events should be to individual members from, for example, the Branch Chair.

  Easton should identify, source and make available appropriate on-line tools and templates to enable Branch Committees to communicate directly with their local members.

  Availability and application of these ‘communication channels’ will be of particular relevance and importance to Branches with relatively few members over wide geographic areas e.g. Scotland, East Anglia.

- The responsibility for the content of the Branch webpage should rest with the Branch itself. Easton should provide the ‘mechanics’ and templates to enable Branches to provide web pages to meet their local needs.

Engagement:

- A comprehensive Engagement Toolkit should be developed by Easton and offered to all Branch Committees. This should clearly identify all available ‘engagement channels’ to local business and academic communities and how and when these can be most effectively employed.

- New members must be personally welcomed and introduced to the Branch. This should include:

  - A high quality ‘Introduction to the Branch’, offered personally to the new member by the Branch Chair.

  - A personal invitation by the Chair to the new member to attend the next Branch event, backed up by a personal welcome and introductions by the Chair upon arrival.

The above recommendation is particularly important for new younger/student members where initial attendance at a Branch event can be somewhat daunting experience and initial impressions can easily colour the individual’s perception of the Institute and desire to participate in future.
5.6: **Delivery**

- Branches should report their performance annually against Key Performance Indicators (KPIs) developed and agreed in partnership with Easton and which will form an integral part of the annual Branch Action Plan.

  These KPIs should reflect delivery against the six key components of the Branch Purpose Statement, recognising both the particular local environment within which the Branch functions and the specific needs of its members. KPIs could, for example, include Attendance at Events and increasing the CIPS/Branch Profile.

- Branch Budget funding should, in turn, reflect delivery against the Branch Purpose Statement via the KPIs.

5.7: **Continuing Professional Development (CPD)**

There is a strong ‘push’ from members for CPD, as indicated by the fact that over 50% of respondents to the BSR Membership Questionnaire expressed a particular interest in CPD. To respond to this level of interest, we would recommend that the Institute should:

- Clearly articulate its support for and the importance to members of CPD. This will require ongoing visible recognition for members actively engaging in CPD activities.

  To achieve this, consideration should be given to ‘re-launching’ the CPD offering.

- Develop and implement a strategy targeted at enhancing the relevance and importance of CPD by employers.

- Implement a simple on-line tool to enable members to easily record their CPD experiences.

- Deliver more local CPD related activities.

We strongly recommend that gaining CPD experience should be linked to active participation in Branch activities, thus encouraging members to re-engage with their local network. We believe that the future of the Branch network will be dependent upon the effective and successful delivery of CPD locally.

5.8: **Elected Council Members**

Elected Council Members should play an important role in providing an effective, two-way communication channel between Council and the Branches and members they represent. Therefore, to encourage this, we recommend that Elected Council Members:

- Immediately upon election, personally make contact with all the Branch Chairs within their area.

- Develop an appropriate and ongoing relationship with each Branch to ensure that they both understand and can reflect ‘their’ members’ needs.
• Should attend a minimum of one event per Branch per year within their area.

In addition, the relationship between an Elected Council Member and a Branch should be reflected in an appropriate KPI within the Branch’s annual Action Plan.

PRIORIT Y 3

5.9: Branding and Branch Governance

The BSR Team has not had sufficient time to explore the issues of ‘branding’ and improving the efficiency of the ongoing governance of Branches. We would recommend that the whole Branch governance structure should be critically examined and re-appraised. Inter alia, this would include:

• Simplifying, streamlining and ‘modernising’ the governance structure and procedures of Branches and addressing, for example:
  
  • The formal Branch Officer structure.

  • The need for and format of Branch AGMs which are generally ill attended and reinforce the bureaucratic nature of the Branch structure and operation.

  • The Branch Handbook which should be overhauled to better reflect the future role of Branches and be far more visually appealing and readable.

• Refreshing’ the terminology associated with Branches e.g.:

  • Replacing the term ‘Branches’ with, for example, ‘Local Network’ or ‘Member Network’.

  • Changing the titles of Branch officials from ‘Officers’ which tend to carry ‘old fashioned’, establishment connotations

However, until more careful thought has been given to such ‘rebranding’, we believe existing terminology should continue to be employed.
<table>
<thead>
<tr>
<th>Number</th>
<th>Contents</th>
<th>Page</th>
</tr>
</thead>
<tbody>
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<td>2A</td>
<td>The Branch Regional Structure</td>
<td></td>
</tr>
<tr>
<td>2B</td>
<td>Easton House Organisation</td>
<td></td>
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<td>3A</td>
<td>UK Membership Questionnaire</td>
<td></td>
</tr>
<tr>
<td>3B</td>
<td>Membership Questionnaire Respondent Profile</td>
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<td>3C</td>
<td>Membership Questionnaire Numerical Results</td>
<td></td>
</tr>
<tr>
<td>4A</td>
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<td></td>
</tr>
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<td>4B</td>
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<td></td>
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<tr>
<td>5A</td>
<td>Regional Event Questionnaire</td>
<td></td>
</tr>
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<td>5B</td>
<td>Workplace Questionnaire/Aide Memoire</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Highlights of CIPD ‘Future of Branches’ Review</td>
<td></td>
</tr>
</tbody>
</table>
APPENDIX 1

BSR – TERMS OF REFERENCE

1. Name

The name of the group is Branch Strategic Review Group

2. Team Members:

   Chair: Roger Keeling – Derbyshire
   Brian Hardacre – Cheshire and North Wales
   Peter Parry – Northampton
   Kate Parker – Devon and Cornwall
   Dorothy Holland – Kent
   Chris Wigby – Sussex
   Phil White – Central London
   Malcolm Taylor – Yorkshire
   Steve Brown – Northumbria

   CIPS Representatives:
   Carol Husband, UK Membership Officer
   Kevin Hickman, Networks Manager

3. Aim

To review the current UK Branch Network to see if it is ‘fit for purpose’ and serves the needs of the UK Membership.

The review has been commissioned as a result of ongoing feedback from the Branches in terms of, for example:

- Growing frustration at Branch level in the inability to ‘engage’ the majority of the membership.
- Poor attendance at many branch events, despite the considerable time and effort put in by Branch Committees and, as a result, the high quality of speakers/events offered to members.
- A lack of understanding of the real needs of local members in today’s environment and how best to respond to these.

It is anticipated that the output of the Review will provide a valuable contribution to the Institute’s three Corporate Strategy and management plans.
4. Timelines/Milestones

This project will start on the 3rd February 2010 and finish at the end of May 2010

5. Objectives/Deliverables

- To clearly identify what Members want of CIPS in their local region through the collection and analysis of relevant intelligence, information and data via whatever channels are deemed appropriate by the Team. These could, for example, include the use of questionnaires, interviews, focus groups, analysis of existing data, benchmarking with similar institutes/organisations etc.

- As a result of this analysis, identify issues which inhibit or prevent the Institute meeting its members’ needs locally. This should include consideration of the existing Branch structure and organisation.

- Via a final report, to make appropriate and specific recommendations for action which can then be included in the new three year CIPS Corporate Strategy.

- The Chair to present the report, on behalf of the Team, to the Director of Professional Development.

(Please see attached anticipated work schedule for more detail)

6. Scope

The purpose of the BSR Team is to focus upon the current UK Branch Network. Any outcomes may be considered for International Branches.

7. Administration

- Administrative support and data needed will be provided by CIPS.

- A summary of the minutes and actions will be added to the Branches’ project management system (Huddle).

8. Attendance

It is anticipated that the Team members will attend all meetings wherever possible. If for any reason they cannot attend, then they should provide input for the meeting to the Chair.

9. Meetings

- The Team will meet monthly (dates tbc at the first meeting).
• The meetings will be either face-to-face at Easton House or via conference calls, depending on requirements.

• The meetings will be hosted by CIPS and any expenses for refreshments will be met by CIPS.

• Any expenses incurred attending these meetings will be made in accordance with CIPS expenses policy.
### APPENDIX 2A

**BRANCH REGIONAL STRUCTURE 2**

<table>
<thead>
<tr>
<th>Area</th>
<th>Branches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland/Borders</td>
<td>Aberdeen, East of Scotland, N Cumbria/S Scotland, West of Scotland</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>Northern Ireland</td>
</tr>
<tr>
<td>North East</td>
<td>Humberside, North Yorkshire/South Durham, Northumbria, South Yorkshire,</td>
</tr>
<tr>
<td></td>
<td>Yorkshire</td>
</tr>
<tr>
<td>North West</td>
<td>Cheshire &amp; North Wales, Manchester &amp; Construction NW, Merseyside, North</td>
</tr>
<tr>
<td></td>
<td>Lancashire</td>
</tr>
<tr>
<td>East Central</td>
<td>Derbyshire, East Anglia, East Midlands, Lincolnshire, Northampton, North</td>
</tr>
<tr>
<td></td>
<td>Lancashire, Peterborough &amp; Cambridge</td>
</tr>
<tr>
<td>West Central</td>
<td>Birmingham</td>
</tr>
<tr>
<td>North Thames</td>
<td>Bedfordshire &amp; Hertfordshire, Chilterns, Harrow &amp; Construction South East</td>
</tr>
<tr>
<td>South</td>
<td>South of England, Surrey, Sussex</td>
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<td>SW and South Wales</td>
<td>Devon &amp; Cornwall, South Wales, Swindon, West of England, West Wales</td>
</tr>
<tr>
<td>South East</td>
<td>Central London, Kent</td>
</tr>
</tbody>
</table>
APPENDIX 2B

EASTON HOUSE ORGANISATION 1
## APPENDIX 3A

### UK MEMBERSHIP QUESTIONNAIRE

<table>
<thead>
<tr>
<th>Number</th>
<th>Question</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>How long have you been a member of CIPS?</td>
</tr>
<tr>
<td>2</td>
<td>What is your grade of membership?</td>
</tr>
<tr>
<td>3</td>
<td>What is your age and gender?</td>
</tr>
<tr>
<td>4</td>
<td>What sector do you work in – public, private, not for profit</td>
</tr>
<tr>
<td></td>
<td>What is your improvement status – employed, self-employed, academic, consultant etc?</td>
</tr>
<tr>
<td>5</td>
<td>Why did you originally join the Institute?</td>
</tr>
<tr>
<td>6</td>
<td>What benefits do you currently value as a member and how would you like these delivered?</td>
</tr>
<tr>
<td>7</td>
<td>What benefits did you take advantage of in 2009?</td>
</tr>
<tr>
<td>8</td>
<td>If you are interested in CPD, what would you like CIPS to offer/do?</td>
</tr>
<tr>
<td></td>
<td>How would you like that to be delivered - online, locally, regionally or nationally?</td>
</tr>
<tr>
<td>9</td>
<td>What further activities/benefits would you like CIPS to offer and how would you like them to be delivered?</td>
</tr>
<tr>
<td>10</td>
<td>Are you happy with your level of involvement with CIPS?</td>
</tr>
<tr>
<td></td>
<td>If you answered no, what do we need to do to encourage you to participate further?</td>
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</table>
**APPENDIX 3B**

**MEMBERSHIP QUESTIONNAIRE RESPONDENT PROFILE**

<table>
<thead>
<tr>
<th>Question</th>
<th>Questionnaire (%)</th>
<th>Full UK Membership (%)</th>
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<tr>
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<td></td>
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<td></td>
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<td><strong>Age</strong></td>
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<td>Public</td>
<td>41</td>
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<tr>
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<td>Charity/NFP</td>
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</tbody>
</table>
APPENDIX 3C

MEMBERSHIP QUESTIONNAIRE NUMERICAL RESULTS

[Bar chart showing the number of years members have been with the organization, with categories: < 1 year, 1-2 years, 3-4 years, 5-9 years, 10-20 years, 20+ years.]

[Bar chart showing the distribution of grades among members, including Fellow, Full (MCIPS), Associate, Diploma member, Certificate, Student, Affiliate.]
What benefits do you value?

How would you like benefits delivered?

[Bar charts showing responses to the questions]
APPENDIX 4A

QUESTION 9: ‘WHAT FURTHER ACTIVITIES/BENEFITS WOULD YOU LIKE CIPS TO OFFER AND HOW WOULD YOU LIKE THEM DELIVERED?’

Free text responses to question 9 numbered 232. Respondents to the questionnaire numbered 841 and, therefore, the percentage answering this question was 27.6%.

The top responses were:

- Technical support - 15.5%
- Education - 15.1%
- Branches - 13.4%
- Events - 9.1%
- Training - 9.1%

Four out of five of the top responses related to aspects covered in other questions in the questionnaire but the exception was education. According to Question (2) in the questionnaire, only 20% of respondents were students and, therefore, the preponderance of education related responses is particularly high.

In addition to allocating the responses to the general categories (plus education) used in the questionnaire, each response was also examined with regard to whether it was national/non-territorially specific [*], local, regional, or on-line. Again, like education, it was found necessary to add one extra new category and that was ‘cost related’ responses. [*No response specifically mentioned the word national and, therefore, it is more correct to refer to ‘non-territorially specific responses.]

Looked at in this way, the percentage responses were:

- Non-territorially specific - 41.2%
- Local [*] - 32.3%
- On-line - 12.8%
- Cost - 11.1%
- Regional - 4.0%

[*Educational comments have been treated as local because it has been assumed that education is delivered locally.]

These results clearly show the importance that members attach to local delivery of services. This emphasis is even greater because a proportion of the cost comments referred to the cost aspects of travel to national events.

Looking at the results in greater detail, I have divided them into these major categories as follows:

- Branches, Events, Networking - 29%
- Education, CPD, Employers, Career - 27.7%
Training, Conferences, Technical support (including Leading edge thinking, best practice, & Procurement Templates) and keeping up to date. 28.1%
Satisfied with current state of play 6.1%
Others 9.1%

1: Branches, Events and Networking

Nearly 50% of the comments in this grouping were about branches. Overall the comments were supportive of branches, e.g.: More branch meetings. My local branch have not been in contact for a considerable amount of time and appear to hold few events, what are CIPS doing to encourage my local branch. Encouragement for members to meet locally at branch events etc. More support to re-activate dormant branches.

Only one response was outrightly negative: I think it's time to wind up the branches. From what I gather they are mostly poorly attended and are outmoded.

But, there was evidence that younger members needed some encouragement to join in, e.g.: Encourage younger members to participate in branch meetings. Branch events are sometimes quite daunting to attend as a newcomer, how about CIPS providing branch secretaries with Student contact info and asking them to attend events and to welcome them into the group.

And, work is required on the relationship between Easton and its branches, e.g.: More support to the branch network, this is woefully inadequate and overly bureaucratic. Stamford has to stop trying to control everything. More consideration of volunteers and the time they put into the branch networks. To me, the heart of CIPS are the local branches. These need more encouragement, and more 'informal' local events. There has been a trend towards aiming for larger local/regional events - but there needs to be a 'pyramid' up from some very simple local meetings.

Events

Events were included with branches because 'local' or 'regional' was mentioned majority of comments, e.g.: More national issues discussed at local level More local events which can act as training and also useful for networking.

There were a high proportion of comments in this group that referred to cost, e.g.: Cost is a high priority and travel to courses has deterred the company from agreeing too many courses therefore local courses would be of huge benefit. Free topical seminars. More online activities, webinars or similar to negate the need for travel and expense of accommodation making it more available.
Networking

23% of comments in this group mentioned networking either for contacts or the sharing of ideas. Over 50% of the respondents wanted this networking to be on-line, e.g.:

- An online network message board to post issues which others can respond to.
- Potentially an online networking site for CIPS members to meet and discuss, like LinkedIn. This could in turn generate more interest in and improved attendance at CIPS training courses and events enabling people to meet in person.

As the last comment shows, the emphasis on ‘on-line’ does not need to mean a rejection of face to face networking. Rather it should be seen as complimentary to the latter.

2: Education, CPD, Employer/Brand and Career

Education

Prominent in this category was education, with over 50% of the responses referring to it. The majority of these responses were of a critical nature e.g.:

- Assess what it is needed to become a full member of CIPS with my knowledge and experience. There is no local support for students in the Aberdeen area - it's very poor. We pay the same fees as anyone else, yet there are no events, limited classes.
- Either improved facilities for studying or, if it is just I am not able to utilise the system correctly, then more availability on how to use the system.
- After having paid over £1k for Level 4 Foundation supported e-learning, I feel that CIPS should offer better value for money. The online course is 'clunky and pre-millennium feel'. The content is very good but the actual frames and way you have to click your way through, it's so old! I would have expected something far more 2010'ish, super slick and digital. Instead it's old hat old technology. The course and the hardcopy books are NOT precisely in line with each other. It's not good enough for a Chartered Institution.
- Course text books could be improved - text content rationalised and made more succinct with improved readability.
- CIPS should fully consider the views of its members and try to meet a higher standard of customer care. In too many situations, the Institute is viewed purely as a money making machine and not as a support mechanism for its student population.

In cases which were less critical there was evidence of a wish for more ‘local’ assistance, e.g.

- More help on taking the exams. Ideally at a local event.
- Easier access to flexible local tuition.

Employer/Brand

The next highest group of comments (19%) referred to CIPS influencing employers, e.g. CIPS needs to raise its profile strategically and practically with the CEOs and CFO's of FTSE Top 250 companies and promote the Profession as not just a buying function, but a function that has a broader commercial proposition in profit maximisation, risk mitigation and value enhancement.
Executive support across key industry sectors to raise procurement profile. I believe CIPS should improve its profile, working especially to raise the profile with employers and to ensure professional recognition much like other professional bodies. CIPS to create climate with employers that qualified CIPS members should only be considered.

One respondent saw a link with branches in this respect, e.g.:
Educating Employers about the benefits of professional procurement. Suggest a multi phase strategy which engages with the branches.

Continuous Professional Development

14% of responses mentioned aspects of CPD, e.g.:
Further professional qualifications / development - may be the OU approach?
A comment regarding - CPD, some of us do a lot remaining up-to-date but do not record this formally for time factor and formalities involved. It would be easier if we could just be able to log in put in a few comments about what we did instead of the formal process.
I definitely don't want CIPS to go down the CPD or you lose the qualification as I worked so damned hard to get it in the first place.

One respondent saw the need for a local role
Local contacts for CPD.

Career

13% of respondents mentioned direct job opportunities, e.g.:
More job opportunities published in the magazines.
I think that Fellows should be offered a free one-to-one consultation with the CIPS Recruitment team as 'priority candidates'.
More Job Search Facilities within Northern Ireland and information on vacancies abroad e.g. Australia etc.

3: Training, Conferences and Technical Support

Under the heading of technical support, I have included access to leading edge thinking, best practice, professional tools and keeping up to date. Together, these areas accounted for just over 60% of the comments in this section. These sections were unique in that all the responses were either national/non-territorially specific or on-line. Examples included:

Leading edge:
I would like new ideas relating to purchasing to be on-line so it may stimulate me to go and find out more about a subject - e.g. risks assess the supply chain.

Best Practice:
Proper evidence based research into procurement best practice. Not shampoo or cosmetic style statistical evidence.
Working in a small organisation the tools and best practice are of greatest benefit
Further development of Best Practice Guides.
Professional Tools:
Online Resources i.e. Templates for Tendering, PQQ etc.
More example models of documentation online. More templates, explanation of terms and conditions.
Keeping up to date.
Email alerts to new and important information regarding suppliers and procurement practice and legal updates.

Again cost rears its ugly head:
If there is a cost savings to my membership fee, I would prefer to have the Supply Management magazine delivered in an online format.

Training

32% of responses referred to training. Cost is a particular feature of the responses in this area:
Reduction in price for courses, they are too expensive so I don’t even consider attending them.
More CIPS courses/seminars/events should be provided either locally or regionally. It is frustrating when every conference etc is held in London.
I would like more training to be done online.
The economic situation severely restricts Public Sector ability to fund CPD and Training. Suggest CIPS seeks out different ways of delivering current programme more flexibly to more members.
We have a real issue in the Public Sector regarding the cost of courses/events etc. Professional Fees are not paid by the employer and the CIPS courses are generally significantly higher than other providers.
More training courses, locally.
The few CIPS training events that I have attended over the years have been good but the costs are generally prohibitive. It’s understood that these are run as a commercial activity but could you consider offering training as a real membership benefit - rather than provided with a small cost preference over non-members?
Better quality on-line training materials.

Conferences

Only 6% of responses mentioned conferences but again there is evidence of members wanting lower cost or more local solutions:
Annual conference/Dinner should be outside London some years - different attendees.
I would like CIPS to offer webinars. These are environmentally friendly and don't take up so much time.

4: Satisfied Group

6% of responses indicated that either members were happy with the current level of services & benefits or that they were new members who felt that had inadequate experience to comment, e.g.:
I have only just become a student member so I don't have any ideas about this yet.
I honestly do not know what you could do which is more. The CIPS organisation is excellent, with mentions in the National News when contacted for information regarding the economy. I should like more dinner events or similar to be more local i.e. Manchester or Liverpool.

Note even a very satisfied member would still like more local events!

5: Others

A mixed bag, amounting to 9% of total responses. However, 25% were linked by comments relating to cost:
- Private health insurance packages at discount prices would be good right now.
- Really reduced rates for full members on everything offered by CIPS!
- A wider range of discounts and deals negotiated for members.
- The CIPS needs to continue to focus on delivering real benefits for its members.

And an example from left field:
- CIPS to work on possibility of opening an exam centre in Algeria. I am based in Algeria, and currently, I have to travel to the UK for each exam.

I thought this was a UK branch survey!

Brian Hardacre
9th March 2010
### APPENDIX 4B

**QUESTION 10: ‘WHAT DO WE NEED TO DO TO ENCOURAGE YOU TO PARTICIPATE MORE?’**

Question 10 of the BSR Review member questionnaire was: ‘Are you happy with your level of involvement with CIPS? If you answered no, what do we need to do to encourage you to participate more?’

There were 157 individual responses. These have been analysed and collated into 19 generic areas which are discussed below:

<table>
<thead>
<tr>
<th>Key Comment Area</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Local Events</td>
<td>26</td>
<td>17</td>
</tr>
<tr>
<td>2 Other Events/Initiatives/Ideas</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>3 Time Constraints</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>4 Difficulties with timing/location</td>
<td>13</td>
<td>8</td>
</tr>
<tr>
<td>5 Branch Operations/Structure</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>6 CIPS Corporate &amp; Support</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>7 Need more information/Communication</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>8 Costs</td>
<td>8</td>
<td>5</td>
</tr>
<tr>
<td>9 Self-motivation</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>10 Wish to be involved</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>11 Regional Events</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>12 Learning</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>13 Technology</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>14 Involvement</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>15 Employers</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>16 Fellows/Senior Practitioners</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>17 CPD</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>18 Perceptions</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>19 Other</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>157</td>
<td>100</td>
</tr>
</tbody>
</table>

Note that nine key areas account for almost 80% of responses. In the summary analysis below, where appropriate, I have included selected actual comments in each section to provide a ‘flavour’ of the responses.

1. **Local Events – 17%**

   Comments on ‘local events’ accounted for almost 20% of all responses. The overall message was clear: ‘More local events’. Associated comments included, for example:
• Make them relevant. In one Branch, for example, all events appeared to be public sector biased, much to the annoyance of the respondent: ‘My local branch is totally dominated by public practitioners. They look with disdain on private sector buyers’.

In another Branch, the respondent is looking for ‘locally organised events aimed at SMEs - all events and subjects are aimed at large companies; very little is offered in any way to those operating at SME level’.

Another respondent noted, ‘There are no events etc, local to my area that are relevant to my job.

• ‘Make them interesting and exciting’.

There were also comments about the timings of and locations for local events (see below).

2. Other Events, Initiatives and Ideas – 10%

There were 16 respondents in this second largest category who offered ideas on alternative events and potential initiatives to increase member interest and which included, for example:

• ‘More events targeted at addressing emerging challenges on procurement e.g. sustainable procurement, sustainability as a general topic’
• ‘I think the 6pm meetings have been going on for years but I rarely feel inspired to go to one. I would rather have a highly work-focused event in working time which is worth attending’.
• ‘Support and mentoring for students and events to engage, promote and encourage engagement. Support with career development. By being more involved as a student would encourage participation once MCIPS achieved’
• ‘More activities that are not branch-centric, with timings to suit work/life balance and the same people are not constantly involved’

3. Time Constraints – 10%

10% of respondents noted that personal time constraints were a significant factor in limiting their active involvement with the Institute. Comments included:

• ‘Due to work pressure/location I’m unable to get to CIPS local/regional events’
• ‘I would like to be more involved locally but don’t have the time to attend many events. An on-line forum - where we can ask/post questions and share ideas - would be good’
• ‘My lack of involvement is due to making less time for personal involvement. My employer doesn't encourage or reward my involvement with the Institute’
• ‘I have reduced my involvement with the local group because of teaching commitments - a pity! However, there's a need for a more dynamic approach to engender more support from the student population - get away from the frosty face of the Institute, be relevant to the area; be proactive in your support’

4. Difficulties with Timing/Location – 8%
8% of all respondents highlighted that the timing and locations of local/Branch events limit their ability to become more actively involved. Comments included:

- ‘I am keen to participate in branch events but the location and timings are not very suitable’
- ‘Could do with more involvement in the Branch events at a local level. Most events are held in evenings which is not convenient’
- ‘Arrange seminars/events which can be attended on-line with teleconference facilities’
- ‘I would prefer to get more involved but distances are too great to make this practical where I live’

5. **Branch Operations/Structure – 8%**

In this category, comments concerned issues with the effectiveness of the operation of the local Branch, particularly:

- The strength and effective leadership – or lack of it – of the some Branches.
- The absence of a ‘live’ Branch (Essex).
- ‘Lack of meetings and very little locally. Apart from magazine, very little available. Courses in the main are very basic’
- ‘As a branch committee member, I feel we could get more practical support from Easton House to help in identifying and organising events - better timely communication etc’

6. **CIPS Corporate and Support – 8%**

Comments here addressed the relationship between Branches and Easton and the CIPS ‘corporate take’ on various issues. The comments tended to be more heartfelt, expansive and detailed, for example:

- ‘It’s minimal involvement as I’m not entirely happy with the lack of support (from Easton) available.
- ‘I am actively involved as Branch chair. However, the Institute appears to have given little priority to Branches e.g. as evidenced by the level of Branch support available from Easton. CIPS needs to reaffirm the importance and role of Branches and match this with appropriate resources, support, systems and guidance centrally’
- ‘CIPS needs to start re-engaging with its grass root members, many of whom are totally disillusioned with its utter inability to organise events that do not clash with the working day’
- ‘I think there needs to be more ‘contact’. Magazines are OK, e-mails are fine but there is no actual face to face or even tele-contact. This is where CIPS falls down. We pay £140 and it feels a bit too ‘light touch’’

7. **Need for Information and Communication – 7%**

Comments here reflected the respondents’ needs for more information and effective communication with Branches and within Branches:

- ‘I am not really aware of what the local branch is - other than the occasional branch event on specific topics’
- ‘Would like more information on events - and also branch information’
- ‘How can I participate and be more involved in CIPS, I don’t know anything?’
- ‘More involvement at branch level, very little communication at present’
8. Costs – 5%

8 respondents cited various ‘costs’ as an issue. Comments included:
- ‘I think the charges for membership that have been forced on by my employer are excessive’
- ‘Cost of training is prohibitive for small companies / consultancies such as mine’
- ‘CIPs training events interest me; however, they have so far proved cost-prohibitive to my current employer’.
- ‘Cheaper charge for Certification (the 30% increase in 2009 stopped dead the business case I was building for my board)’

9. Self-Motivation – 4%

7 respondents felt that their lack of involvement was an issue for themselves and their self-motivation, not the Institute:
- ‘Happy to be more involved locally and nationally but up to me to do something about it!’
- ‘Just keep sending me the events and I need to find the time and conviction to go to an event’
- ‘I need to find time within a busy lifestyle to accommodate this valuable activity!’
- ‘Kick me!’

The remaining 10 categories accounted for about 20% of the responses. In summary, the key findings are:

- Eight respondents expressed a non-specific wish ‘to become more involved’.
- Five sought more regional events and a ‘stronger regional focus’.
- In terms of technology, there were two comments on the urging the use of further on-line services e.g. networking, via a hosted discussion portal.
- Three respondents noted that their employers were not supportive of active involvement with the Institute.

Roger Keeling
March 2010
APPENDIX 5A

REGIONAL EVENT QUESTIONNAIRE

CIPS is undertaking a ‘Branch Strategic Review’ to focus on and more fully understand what the Institute’s UK membership would like CIPS to provide in their local regions. As a result, CIPS wishes to identify and address any ‘gaps’ in order to more closely meet the needs and aspirations of our members.

To help provide essential information for this review, an on-line questionnaire was recently sent to some members. Did you receive and complete this questionnaire? If not, can you spare just a few minutes to answer some questions about your views on local support for CIPS members?

1. This is a Regional Member event that CIPS has organised. CIPS also supports events in your area run by your local Branch.

   Do you know of your local CIPS Branch? YES/NO

   Do you know how to make contact with it? YES/NO

2. Have you attended any Branch events or activities in the past 2 years? YES/NO

3. Are you aware of the range of activities your Branch has on offer? YES/NO

4. What are your preferred methods of keeping up to date professionally?

   Reading
   Networking to share experiences/ideas
   On-line searching/research
   Free local events
   Training
   Seminars/workshops/conferences
   Continuous Professional Development (CPD) events
   Other – please specify:

5. How can your local Branch support or add value in helping you keep up to date?
6. What do you particularly depend on to help advance/develop your own career?

| Professional Qualifications | recorded Continuous Professional Development (CPD) events | Networking with other professionals, colleagues or contacts | Employers’ recognition of CIPS and the ‘CIPS brand’ | Other – please specify: |

7. How can your local Branch support you or add value in helping you with your career?

<table>
<thead>
<tr>
<th>Through Branch activities</th>
<th>Your views please</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-line e.g. via LinkedIn</td>
<td>Other</td>
</tr>
</tbody>
</table>

8. Do you have any further comments?

Thank you for your thoughts and time.
APPENDIX 5B

WORKPLACE DISCUSSIONS QUESTIONNAIRE/AIDE-MÉMOIRE

Introduction

CIPS has initiated a ‘Branch Strategic Review’ to focus on and more fully understand what the Institute’s UK membership would like CIPS to provide in their local regions. As a result, CIPS wishes to identify and address any ‘gaps’ in order to more closely meet the needs and aspirations of our members.

To undertake the Review, a small team, comprising of representatives from branches across the country, has been established. Its findings, conclusions and recommendations will be incorporated in the Institute’s three year forward strategy.

To provide essential information to this team, we would very much welcome your views and input on the following:

1. How long have you been a member of the Institute?

2. What is the extent of your direct personal involvement with CIPS?

3. What do you see as the benefits to you of CIPS membership?

4. What benefits, if any, have you personally taken advantage of over the past year/two years?

5. Are you aware of your local Branch and how to make contact with them?

6. Are you aware of the range of activities that your local Branch can offer you?

7. Have you attended any Branch and CIPS events or activities over the past year/two years? If so, what were they?

8. How do you keep up to date professionally e.g. reading, networking, on-line, local events, training, seminars/conferences, and CPD events?

9. What do you particularly depend upon to develop and enhance your own career e.g. professional qualifications, CPD events networking, recognition by employers of CIPS?

10. What could CIPS and Branches offer to add value and support you in.....?

   ▪ Keeping up to date
   ▪ Developing and enhancing your career
   ▪ Any other areas of particular interest to you
..... through, for example, local activities, on-line etc?

11. Do you have any other points, concerns or suggestions?
APPENDIX 6

HIGHLIGHTS OF THE CIPD ‘FUTURE OF BRANCHES’ REVIEW

Background

The Chartered Institute of Personnel and Development (CIPD) faced very similar issues concerning its UK branch network as those within CIPS which triggered the Branch Strategy Review (BSR). As a result, the new CIPD Chief Executive initiated the ‘Future of Branches’ review which was undertaken during 2009.

This review, like the BSR, was undertaken by a working party of 11, comprising 8 representatives from CIPD’s UK branches and 3 CIPD staff members.

CIPD has about five times as many UK members as CIPS, with a network of 47 branches. Average branch membership (2695) is three times that of CIPS (837):

<table>
<thead>
<tr>
<th></th>
<th>CIPS</th>
<th>CIPD</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK Membership</td>
<td>28,460</td>
<td>126,687</td>
</tr>
<tr>
<td>Annual Turnover</td>
<td>£15.9m</td>
<td>£30m</td>
</tr>
<tr>
<td>Number of active UK Branches</td>
<td>34</td>
<td>47</td>
</tr>
<tr>
<td>Average Branch membership</td>
<td>837</td>
<td>2695</td>
</tr>
<tr>
<td>Average attendance at Branch events</td>
<td>11%</td>
<td>16%</td>
</tr>
</tbody>
</table>

The BSR team would like to thank CIPD for openly sharing the findings, conclusions and recommendations of the ‘Future of Branches’ which were provided extremely helpful input to the development of the BSR conclusions and recommendations.

Implementation of the ‘Future of Branches’ recommendations is currently well advanced.

Findings and Conclusions

In order to gather information, inter alia, an e-questionnaire was sent to some 200,000 ‘HR professionals’ which generated a response from 4263 members and non members. By comparison, the BSR on-line questionnaire was sent to 8000 CIPS UK members, resulting in 841 responses.

The key conclusions of the CIPD review were:

- Personal contact is very important, particularly at a senior level. Junior staff tended to favour online sources when looking for hard facts quickly. However, branches were less likely to be selected for face-to-face networking than other methods.

In order to meet members – and potential members – needs, the current approach to local member engagement was inadequate and needed to change.
- Branches should be a primary channel for member and potential member engagement at a country and local level in order to:
  - Respond to and advise CIPD on HR policy and practice.
  - Support CIPD in building the current and future capability of the profession.
  - Help to make HR a compelling career choice.

- The core principles to be applied for the future of branches were identified as:
  - Alignment to CIPD’s strategic direction, business operations and external and internal guidelines.
  - Decentralised from headquarters but ensuring that there are clear lines of accountability and feedback, ensuring partnership working to achieve common goals.
  - Representative of the current and anticipated membership profile and inclusive of all sectors and walks of life.
  - Consistent quality branding through CIPD local networks, ensuring an equitable customer experience.
  - Flexible and responsive to member and market needs.
  - Performance will matter and be measure.
  - Share, where possible, resources for managing common and consistent task e.g. administration and event management.
  - Local network and local ambassadors will spend their time on activities which are customer facing and representative of the needs of members and potential members locally.
  - Run with up to date and effective financial and governance processes.
  - Operate in an ethical manner and adhere to the Code of Conduct and principles of equality and diversity.

- Three organisational models were examined, namely:
  - **Viral Network** which is allowed to flourish and fade of its own accord.
  - **Hubs with local Networks** where several local networks reporting into ‘hubs’. The hub would be managed by a Hub Manager, reporting to the local networks, accountable to and funded by CIPD. The hubs would provide a range of services to the local networks e.g. manage hub websites, manage on-line event bookings/attendance lists, manage income and expenditure, and manage local e-newsletters.
  - **Fully Integrated** which would retain all the elements of ‘hubs’ (above) but would integrate all activities

  The preferred and recommended option was ‘Hubs with local Networks’.

**Recommendations**

The ‘Future of Branches’ working party made the following recommendations which have been accepted and are currently being implemented:

- Redefinition of – and agreement to - the purpose and principles of branches together with appropriately updating the Branch Constitution. This to include:
  - Improved communication and a partnership approach between branches and head office.
- Increasing local face-to-face member engagement.
- Ensuring all members and potential members have a local named contact, available during working hours, to improve customer service levels.
- Provision of an on-line branch offer to complement the face-to-face offering.
- Ensuring branch successes are replicated across the network.
- Ensuring branch performance is measured.
- Improving ‘brand consistency’ and quality throughout the network.

- Maintain a de-centralised structure via ‘hubs with local networks’. This will require the appointment of 8 local ‘Branch Co-ordinators’ to support 6 branches each. The Co-ordinators will report to their allotted Branch Chairs on a day-to-day basis and with a dotted line to the (central) Branch development Manager.

- Implementation will require:
  
  - Effective wide and timely communication of and consultation on the review’s findings, conclusions and recommendations over a three month period.
  
  - Pilot the operation of the Branch Co-ordinator concept in the first half of 2010, with an evaluation of the pilot prior to full roll-out. This is currently underway.
  
  - Further development of the concept of a ‘Virtual Branch’ to complement, not replace, the proposed branch model where face-to-face networks prove not to work well e.g. where there are rural challenges.