



ICAEW Members in Scotland (IMS)

Annual Report 2018/19

It has been another busy year for IMS with – as you can see from the appendix – a huge range of events taking place across Scotland. From social gatherings such as the Munro walk and annual dinner to CPD opportunities including Scotland's first Essentials Roadshows, wherever you are in your career – and whatever your career path – IMS's events diary had something to offer.

One of the stated aims of IMS is to **support the professional needs of members** and I hope that the variety of events, reflects that. Our programme of events is constantly evolving and our goal is to continue to build upon our success to date.

As my time as President comes to an end, I would like to thank everyone who has attended any of our events for helping to make them a success and, in particular, I would like to thank all our members who have been involved in organising these events.

These events – and other activities – have helped IMS realise a number of our priority objectives:

1. Listening to members to understand their needs and concerns

We hosted a number of events across the county, designed to help members at all stages of their careers. In Aberdeen, for example, we hosted events for FDs, a roundtable event for younger members with ICAEW CEO, Michael Izza, and an oil and gas industry roundtable with the ICAEW Energy and Natural Resources Community, which Michael also attended.

Younger members also had the chance to share their thoughts with ICAEW President, Paul Aplin, at an Edinburgh event in the autumn. I am delighted that our younger members are able to enjoy such opportunities.

We also took our Business Confidence Monitor (BCM) breakfasts around the country, with sessions in Edinburgh, Glasgow and Gleneagles; these quarterly events allow members to share and discuss the challenges and issues they are facing as well as explore the current BCM results with our expert hosts.

2. Communicating with members through multiple channels

We operate in one of the largest geographical areas in the UK, and embracing digital technology allows us to connect with more members, and for members to better connect with the committee and IMS in general.

We have already used digital technology (albeit with a few teething problems) as part of our committee meetings, which has the potential to open up the group for those outside the Central Belt – and to help reduce the carbon footprint of Committee members who live and work outside Edinburgh by allowing them to attend some meetings virtually rather than in person.

Our social media accounts enable members to stay up to date with news and event information; both our LinkedIn Group and Twitter accounts have continued to gain new followers, and we enjoy good levels of engagement on Twitter with both members and the wider business community.

In addition, around 1000 members receive our monthly e-newsletter, which enjoys some of the highest click through rates of any regional ICAEW publication in the UK.

3. Increasing participation and knowledge sharing online/offline forums across Scotland

Recently we launched new small/sole practitioner forums in Edinburgh and Glasgow to allow members to enjoy peer-to-peer learning and information sharing. Our FD Forums continues to provide networking opportunities for members and a space to share ideas and concerns in a supportive environment; many members have told us that being able to explore issues with fellow professionals is both useful and reassuring.

The team is constantly working hard to ensure that more events take place beyond Edinburgh and Glasgow; several events this year took place in Aberdeen and opportunities in Inverness and other towns and cities are being explored with local member input.

2018 saw the ICAEW CPD Essentials Roadshows take place in Scotland for the first time, with four events taking place in Edinburgh; I am delighted that the programme has been extended for 2019, with six events scheduled including sessions in Glasgow.

4. Promoting business development in Scotland

Activities in this area included a member lunchtime roundtable with Ian Murray MP (Labour, Edinburgh South). The event was part of a UK-wide ICAEW programme where members meet and speak to politicians about issues within the profession and beyond; David Bond, ICAEW Scotland Director, and Ian Wright, (then ICAEW's Corporate Engagement Director), also joined the discussion. David also joined Paul Aplin at a Ministerial meeting with ICAEW member, Kate Forbes MSP, Minister for Public Finance and Digital Economy.

We also worked with a number of other professional bodies to host events, including a Productivity event with IoD in Edinburgh. These opportunities to share ideas with our peers outside accountancy offer members the chance to explore new takes on a subject and to make new connections, as well as raising our profile within the wider business community.

We continue to reflect and include the UN Global Goals for Sustainable Development in many areas of our work, find out more via the [ICAEW Global Goals hub](#)

5. Some personal highlights

My personal objectives for this year were to focus on events, engagement and the use of digital technology (see above). It was therefore very pleasing to see increasing attendance, volume and diversity of our events. We have reached out to more members in Scotland during the period, engaging on areas that matter to them, which I'm sure will help to create a long-term community.

Looking back over the last twelve months some key things particularly stood out for me.

Firstly, the Annual Dinner, held in Edrington's Glasgow HQ was a thoroughly enjoyable evening. Members had the opportunity to meet ICAEW President Paul Aplin and hear about the fascinating history of the Edrington Group and its unique partnership with the Robertson Trust. There was even an opportunity to sample some of Edrington's fantastic product! There was a good turnout from our student members and the evening was also an opportunity celebrate their recent exam successes.

Secondly, when I became IMS President almost two years ago, I mentioned the large amount change that we were experiencing both as a group and as an Institute. This is still the case today and during my tenure I've seen a number developments, many of which bring real benefits to members here in Scotland. One such example is the increased use of digital technology with ICAEW as a whole, such as a growing number of webinars on key topics and the live streaming of events such as MP Rachel Reeve's keynote speech at Chartered Accountants' Hall.

Being able to access such content on line means that no matter where our members are they are able to stay connected with the latest developments. It is clear to me that digital activity will continue to play a vital role in the future and with this in mind, your IMS committee will continue to adapt to change but will also continue listen to you all as members.

The IMS Committee continues to evolve and I would encourage anyone to make contact if they have something they would like to discuss or a suggestion they would like to make.

Finally, I would also like to thank the following individuals without whose support IMS would not function: David Bond, Director in Scotland; Alison Tait, Regional Events Executive; Jane Walker, Regional Communications Consultant; and, in particular, Fiona Ormiston, Senior Regional Executive, who makes the role of President a lot easier than it might otherwise be!

Neil Strong

President

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April 2019

Events delivered 2018-19

18 Apr	ICAEW Essentials Roadshow: Tax update	Edinburgh
18 Apr	ICAEW Essentials Roadshow: Bringing the numbers to life	Edinburgh
25 Apr	Annual General Meeting with student and training update	Edinburgh
25 Apr	Charity quiz challenge	Edinburgh
26 Apr	Edinburgh Tax Network: VAT Groups	Edinburgh
2-3 May	ICMGR Conference: Ethical Finance and Governance in Emerging Markets Conference (ft. Belt and Road Initiative), supported by ICAEW Scotland	Edinburgh
31 May	Edinburgh Tax Network: Recent Tax Cases New Inheritance Tax	Edinburgh
2 Jun	IMS Munro walk: Stuchd an Lochain	Glen Lyon
5 Jun	Accidental leader series – leadership, organised by the Professional Bodies Forum of Scotland	Edinburgh
6 Jun	Business insights breakfast (BCM Q2)	Auchterarder
13 Jun	Practice member breakfast with ICAEW's head of Practice	Glasgow
13 Jun	Productivity panel discussion, jointly organised with IoD Scotland	Edinburgh
14 Jun	Edinburgh Tax Network: New IHT	Glasgow
28 Jun	Edinburgh Tax Network – Tax Planning for buy-to-let landlords	Edinburgh
6 Jul	Retired member tour and lunch at Glasgow City Chambers and Lighthouse	Glasgow
10 Jul	Challenges and opportunities for the oil and gas industry roundtable with ICAEW CEO and ICAEW Energy and Natural Resources Community	Aberdeen
10 Jul	Roundtable for younger members and students with ICAEW's CEO	Aberdeen
26 Jul	Edinburgh Tax Network – Facts and evidence in litigation	Edinburgh
4 Sep	Accidental leader series – delegation, organised by the Professional Bodies Forum of Scotland	Edinburgh
5 Sep	Business confidence and investment insight breakfast roundtable (BCM Q3)	Edinburgh
4 Oct	Accidental leader series – critical conversations, organised by the Professional Bodies Forum of Scotland	Edinburgh
5-6 Oct	Practical tax conference	North Queensferry
10 Oct	Younger member and student roundtable with ICAEW President	Edinburgh
10 Oct	IMS Annual Supper	Glasgow
30 Oct	Budget Breakfast	Edinburgh
31 Oct	Budget Breakfast	Glasgow
14 Nov	IMS FD roundtable with Bank of England Agent for Scotland	Edinburgh
20 Nov	ICAEW Essentials roadshow: Financial reporting	Edinburgh
20 Nov	ICAEW Essentials roadshow: Business partnering	Edinburgh
30 Nov	Roundtable lunch with Ian Murray MP	Edinburgh
4 Dec	Business insights breakfast (BCM Q4)	Glasgow

5 Dec	Festive networking for IMS members	Edinburgh
6 Feb	Scotland Budget review	Edinburgh
20 Feb	Inverness member lunch with ICAEW Scotland Director	Inverness
26 Feb	Accidental leader series – leadership, organised by the Professional Bodies Forum of Scotland	Glasgow
28 Feb	Edinburgh Tax Network: HMRC Representations, guidance and legitimate expectations	Edinburgh
13 Mar	Business confidence and optimizing performance breakfast seminar with Mazars (BCM Q1)	Edinburgh
20 Mar	Accidental leader series – delegation, organised by the Professional Bodies Forum of Scotland	Glasgow
22 Mar	Life Member afternoon tea	Edinburgh
28 Mar	Edinburgh Tax Network: BPR, The Pawson Problem Wholly or Mainly Holding Investments?	Edinburgh