



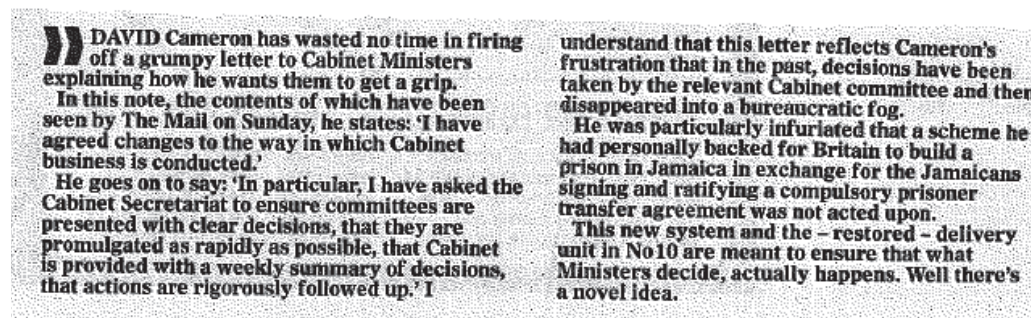
I have collected 'The Bell' and other artefacts from Phil and these are now on display in the N&G Conference Room. Please let me know if you would like a private viewing as they belong to IIS and are part of our heritage.

The short week has flown by! The great work Susan is doing to produce the attached Planner is helping me to balance my two roles. The demographics of my team at Navigators mean that the half term break reduces staff levels temporarily as we enter our busiest season. The N&G sponsored 24 hour 'Three Rivers Race' takes place on the Norfolk Broads this weekend. David Boghurst is skipping N&G's (hired) yacht and Paul will be under David's command.

Lara Squires invited me to attend a Business Breakfast at the AMEX Stadium on Tuesday and I had the opportunity to meet several local business leaders who were very interested in our Institute's regeneration. I was keen to hear how businesses view market trends following the General Election. Navigators are a good barometer of economic health as yachts and motorboats are often a luxury spend. We are seeing an increase in enquiries and potential clients are negotiating keenly on price. An Accountant explained how many companies are holding substantial cash reserves and he expects these to be released into the economy. Business confidence is growing and this was highlighted by a recruiter who places returnees and early retirees into part-time roles. All the businesses were making plans for Auto Enrolment and I am looking forward to next Tuesday's Pensions talk in Crawley.

Congratulations to Charlotte Penson for her success in becoming CertCII PFS. With this dual qualification Charlotte is demonstrating her professional commitment to General Insurance and Personal Finance.

### Inaugural Council Meeting 10<sup>th</sup> June



Does David Cameron have a spy in our camp? I hope I'm not seen as 'grumpy' though!

*Mail On Sunday  
24 May 2015*

This, along with the Annual Dinner arrangements, is my current focus. Susan and I met to prepare the Agenda and together we are confident that the meeting can be concluded within 90 minutes including discussion time. We need everyone's help to keep on track. We have standardised the reporting format for Secretariat (Susan), Programme (Phil), Membership Engagement (Graham) and CSR (Charlotte). Susan will shortly request team reports which consolidate individual initiatives. The templates contain bullet point achievements and plans and a section highlighting those items requiring Council discussion and approval. Susan will distribute a slim-line meeting pack next weekend so she will need all submissions by 5pm next Friday.



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The new meeting format at the Café Rouge will include a working supper in recognition of the time everyone is giving to support us and especially those who are working during the day. Thank you Colin for coordinating the menu choices and liaising with the restaurant. Colin has arranged a splendid choice based on the Café Rouge's business menu. I will send this separately and encourage you to return it quickly. In Colin's words, No Form, No Food! He means it!

We are also preparing for Phil's first Programme meeting. The Planner is filling up and those with a keen eye will spot the appearance of "Personal Impact" on 2<sup>nd</sup> September. Charlotte Roch has arranged for a coach to Zurich's senior leaders to work with our members. Definitely a date for the diary. It could change your life! Richard has several ideas for CPD events that will be discussed and scheduled at the meeting.

Phil is looking for someone to arrange some sporting events. Can anyone help get this off the ground? The CSR team is meeting in June and I'm thrilled that Ian Williams is supporting Charlotte. This places our Personal Finance colleagues at the centre of what we do for the community and members.

### **My plans for next week**

Follow up with Lara Squires who has presented to our team on how we can make the most of Social Media. With Lara's and Victoria's help we hope to introduce an IIS LinkedIn group.

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Tuesday Evening – Crown Plaza Hotel Crawley for Pensions Enrolment where I'm looking forward to meeting Sussex PFS Chairman Martyn Bowen.

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Rachel Hankey has kindly given me permission to share her 2020 Vision report with other CII Institutes keen to learn from our Journey. These include Ireland where Nigel has given me valuable insight on experiences dealing with them in the past. Several firms are now regulated by the Bank of Ireland and so it can only help to work together.

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Graham has returned from his European driving holiday and we will be catching up on plans around Membership Engagement. Similarly, when Paula returns I look forward to scoping Dinner plans with the team so that they can be presented to Council for approval.

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I need to finalise our paper mailing to members through the CII announcing the change of name (with Victoria and Susan).

Best as always!

