

building
better
together.



Annual Report 2020



Facing challenges
together



Overview from the Chair

At last year's annual conference in Liverpool, we announced that our key strategic themes for 2020 included plans to increase membership engagement, enhance member services and broaden our quality assurance and standards (QAS) support. We had a positive start to 2020:

- We had clear plans to deliver Knowledge Hub which remains central to membership engagement
- We had a comprehensive programme of activities in place for our industry groups and expert panels (GaPs) including plans for the 2020 Annual Conference in Belfast
- Having extended our QAS services for accountancy firms, discussions were underway to create a new Lawyers Quality Assurance and Standards (LQAS) scheme.

During those early weeks of 2020, our recruitment pipeline was strong, and we were in the process of recruiting several new members. We had also attained a satisfaction rating of 8.10 from members in the 2020 membership survey (up from 7.75 in the previous year). This told us that we were generally in tune with members' needs. Then at the beginning of March, we became acutely aware that the international epidemic that we now know as COVID 19 was likely to impact the UK.

Our first action was to produce an emergency business plan and budget which was agreed over the weekend of the 15th of March 2020 – one week before Boris Johnson told the country that people 'must' stay at home and certain businesses must close. The plan had four objectives:

- Secure the UK200Group's governance and leadership
- Galvanise and strengthen engagement and support for members
- Adapt the UK200Group's delivery model to support members
- Provide an additional voice to support members and their SME clients.

Looking back, our members tell us, we were amongst the first organisations in the UK to respond decisively to the crisis. On balance, as a group of around 500 partners, I think we rose to the challenge: we quickly re-organised ourselves so we could collaborate; we transferred our services to on-line; we set up a new Public Policy Group (PPG), and; we formed a Marketing Taskforce to generate 'plug and play' resources to help members strengthen their support for their SME clients. In addition, we began to share our thoughts on how the Government might better support business; over one third of our managing partners signed our first letter to the Prime Minister and Chancellor of the Exchequer setting out our suggestions as leading accountants and lawyers on their support packages for SMEs and the self-employed.

During the year we did not lose sight of our wider ambitions: Knowledge Hub is now fully operational with over 3000 users; around 2000 people attended our online GaPs, wider practice forums and soft skills training events, and; some 23 firms attended our QAS compliance workshops (up from 8 in 2019).

I would like to take this opportunity to thank everyone concerned with the UK200Group - members, the board of directors, committees, business partners and our team at the Centre. Based on the progress over the past year, I firmly believe that our Group will emerge from this crisis stronger than ever. However, with the ongoing risks to public health and economic uncertainties we have more work to do. I am therefore very pleased to say that within all of this, the Board has also agreed a three-year strategic plan which will help us to grow our support for members and help you continue your commitment to the ethos of **building better together**.

As I will be stepping down as your Chairman this year, I would like to take this opportunity in thanking everyone for their support over the last three years.



Kevin Powell
Chairman, UK200Group





Update on 2020

The progress made in delivering the plan's four key objectives

1 Secure the UK200Group's governance and leadership

Summary of activities:

At the outset of the crisis we established clear reporting lines and streamlined decision making so that our CEO, Declan Swan, could make decisions with confidence under delegated responsibility from the Board. We established a programme of drop in calls for managing partners, IT, HR, and marketing leads to ensure everyone had access to an appropriate support network of peers. We also relaunched our Lawyers' Group - which together with the Managing Partners Drop In calls - has directly informed the development of our new three-year strategic plan.

Cumulative outputs:

- c250 participated in GaPs drop in calls
- c650 participated in managing partners' drop in calls
- c70 participated in lawyer partners drop in calls
- c135 participated in marketing drop in calls

What members said:

"I would urge everyone to think about participating in the regular drop in calls. We've learned a lot, useful for our own firm, about what others are doing. Discussions are honest and truly collaborative. UK200Group at its best!"

Robert Postlethwaite, Managing Partner, Postlethwaite Solicitors

2 Galvanise and strengthen engagement and support for members

Summary of activities:

Towards the end of March 2020, we set up a new Marketing Taskforce to provide members with marketing support on topics relating to COVID-19, latest government policy and Brexit. The support included high quality 'plug and play' resources that members could easily apply to their websites and social media platforms. They could also be used in dealings with local influencers including MPs. We stored all collateral in our COVID-19 Resource Centre on the UK200Group website. More recently on the 28 September 2020 - following a slight interruption due to COVID-19 - we launched our new Knowledge Hub which is fast becoming a resource that every member of staff across UK200Group can access to use in their practice routines.

Cumulative outputs

- c2700 individuals visited the COVID-19 Resource Centre during the year
- c3000 users have access to Knowledge Hub
- 21 'plug & play' marketing messaging packs published

What members said:

"During these unusual times, the UK200Group has provided valuable support in so many ways. Members are collaborating to provide each other and their clients with current, considered and commercial advice about the fast changing government initiatives and economic impact of the Coronavirus that has affected our businesses, our clients and our people"

Cathy Revis, Managing Partner, Fiander Tovell



3 Adapt the UK200Group's delivery model to protect its members

Summary of activities:

In early April 2020, we reviewed our delivery model and quickly decided to flex it to meet members' changing priorities. We were acutely aware that many of our services were delivered through face to face engagement and that if we were to be of any real value, we needed to not only transfer all activities on-line but also reduce our pricing for events to make them more accessible. By mid-April, our new on-line service offering was on the UK200Group website and our COVID-19 web pages were operational. We were fortunate that so many senior chartered accountants and lawyers from member firms stepped forward to lead webinars on topics ranging from family law and immigration to practical coaching and mental health and wellbeing. We also digitalised our QAS process and are delighted to report that 100% of member firms achieved efficiency grade 1 or 2.

Cumulative outputs:

- c520 people attended GaPs webinars (up from 300 in 2019) an increase of 173%
- c300 attended practice forums including managing partners, smaller firms, marketing, people development, and IT (up from 108 in 2019) an increase of 280%
- c100 delegates attended our revamped Pathways Programmes
- 49 delegates from 23 firms attended QAS compliance workshop online (up from 8 firms in 2019). Increase of 287.5%

What members said:

"We very much appreciated the introduction of on-line webinars in lieu of face to face meetings because it helped us to engage our staff teams in a range of useful topics across the charities and academies sector. The flexibility of recorded and live attendance is crucial in the current times as we move towards a flexible working environment. We also welcomed the decision to reduce the attendance costs as it allowed us to involve more people" **Michael Cooper-Davis, Director, Price Bailey**

4 Provide an additional voice to help our members support their SME clients

Summary of activities:

On the 18 March 2020, we held our first meeting of our Public Policy Group (PPG) to discuss how we might prepare for whatever policies might emerge from Government. Whilst we understood we couldn't lobby (as that's beyond our remit), we felt we could as a minimum interpret policy for SMEs and offer our expertise to policy makers. To inform our thinking we initiated a programme of regular SME surveys; the first one yielded over 1700 responses and served to raise our members profile in the press and amongst politicians. More recently the PPG developed proposals for a Business Owners Support Scheme (BOSS) which has captured the attention of several influential Members of Parliament and which may yet inform national policy given the level of interest.

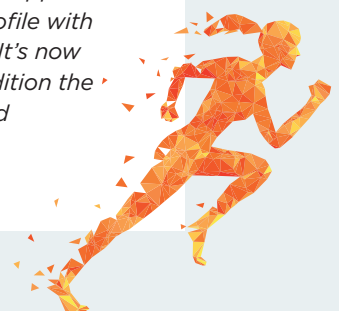
Cumulative outputs

- c3543 SMEs and self-employed participated in our five polls
- 8 guides for SMEs published including 'Coronavirus Government support for Business, Everything SMEs need to know about furlough, Preparing for Brexit: A Guide for SMEs'
- 250,000 impressions on social media

What members said:

"I have been proud to work closely with colleagues on the PPG to add an expert voice to support SMEs and the self-employed during the crisis. Our work has raised the UK200Group's profile with the Government, civil servants and MPs - many of whom have taken an interest in BOSS. It's now important that we all collaborate to maintain this profile for the sake of our clients. In addition the support from the Centre has enabled us to reach clients with information they have found invaluable and which we could not have been able to resource ourselves. "

David Macdonald, Managing Partner, The Martlet Partnership





New Members

We warmly welcome chartered accountancy London firm **Ecovis Wingrave Yeats** into UK200Group membership

Business Partners

We would like to thank:

Currency Solutions

Firm Academy

ForrestBrown

JE Consulting

Keys Finance

Markel

Mercia

NewlyQualified

Ntegrity

Practice Webinars held in 2020

HR Coaching Introduction

Clare Downes - Circle Communication

HR Mental Health & Wellbeing

Natalie Pitt - WR Partners

An Analysis of the Marketplace

Steve Cox - IRIS

HR Coaching Practical

Clare Downes - Circle Communication

QAS Practice Assurance

David Norris - Mercia

QAS Anti-Money Laundering

David Norris - Mercia

QAS Key Audit Compliance

David Norris - Mercia

Unified Communications

Alex Whitford

Innovate Your Marketing

Peter Watson - Distract

Lots of new marketing thoughts

Jo Edwards - JE Consulting

Smaller Firms

Succession - Richard Hill - GSM

Benchmarking - Stuart McCallum - TVM and Paul Stafford - TBL

Pricing

Andy Poole - Armstrong Watson

Nigel Haddon - Burcher Jennings

Managing Partners

Martin Clapson - Price Bailey

Terri Bruce - Dains

Robert Postlethwaite - Postlethwaite

Giles Nunn - Ellacotts

Chris Ketley - Knill James

GaPs Webinars held in 2020

Corporate Finance Virtual Workshop

Corporate Finance Panel

BR&I Avoiding the Cliff Edge

How Business Recovery & Insolvency can help

BR&I Specialist Group members

Agriculture Outlook

Richard King - The Anderson Centre

Healthcare Doctors & Dentists Update

Bob Trunchion - MacIntyre Hudson

Academies

Accounting, Audit & Regularity Hot Topics

Peter Herbert - Insight Training

Charities Audit & Financial Reporting

Peter Herbert - Insight Training

Charities VAT Update

Debra Dougal - Haslers

Advisory

Sales Success in a Challenging Environment

Matt Garman - Salesenabla

Property & Construction

Paul Bagust - RICS

Lawyers

Family, Treatment of trusts in a divorce setting

Beverly Morris - Loddors Solicitors

Agriculture Agriculture and Environment Bills, Policies & Trade

Jeremy Moody - CAAV

Academies Pension Update

Tom Hoare - Hymans Robertson

Academies ESFA Update

Craig Alderson, Andy Spence & David Massey - ESFA

Freelancers & Contractors IR35

Dave Chaplin - ContractorCalculator

Legal Sector SRA Update

Richard Lane - Legal Finance Professionals Ltd

Healthcare Pensions

Graham Crossley - Quilter

Corporate Finance Panel Virtual Workshop

Tax Pick and Mix Open Webinar

Tax Panel

Lawyers Immigration

Gary McIndoe - Latitude Law

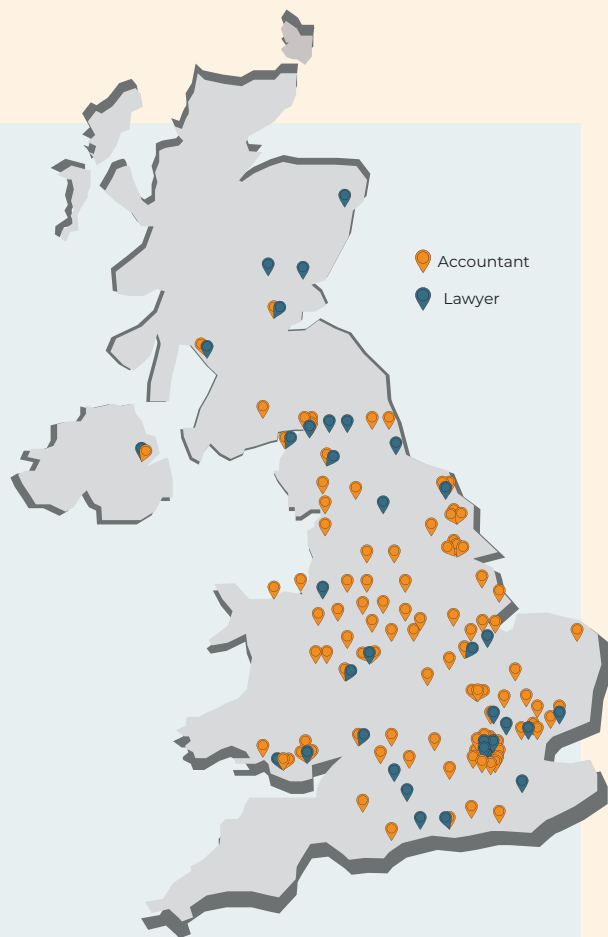
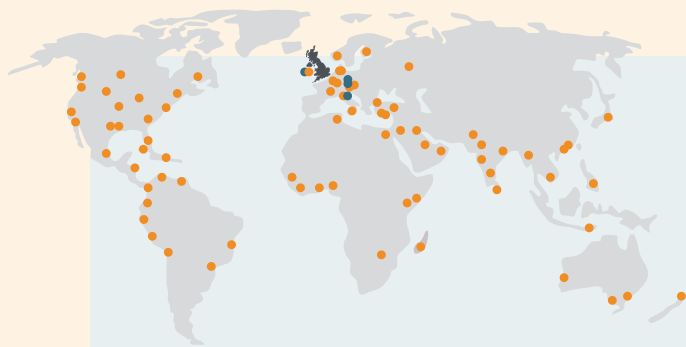
Agriculture How Farmers and landowners can make money from natural capital



Jon Dearsley - Savills

Property & Construction

Timothy Douglas - Propertymark





 Accountant
 Lawyer

UK200Group in numbers

- £250 million turnover
- 145 UK offices
- 550 UK partners
- 3000 staff
- 28 international associates (IAs)
- 75 countries via IAPA/IAs
- 150,000 SME clients

Standing

If listed in national rankings for 2019, UK200Group would have ranked 8th for chartered accountancy firms in the Accountancy Age Top 50 and 21st for law firms in the Lawyer Top 100.

Vision

Recognised Professional Services Group brand in the SME market amongst businesses and influencers.

Mission

Position UK200Group as a strong, focused, and forward-looking membership association of quality assured, independently owned chartered accountancy and law firms run by members for members to support their SMEs and private clients

Purpose

A platform to help members engage with one another through enhanced support for firms and their SME and private clients.

We believe in:

- Collaborating with each other
- Building connections with one another
- Driving the highest standards of quality
- Sharing best practice, knowledge and skills
- Growth and innovation

International

The UK200Group is a National Accounting Group of IAPA which entitles eligible members to access their far ranging international support in over 75 countries. The UK200Group also has 28 International Associates worldwide.



If you would like to receive further information on the UK200Group or any aspect of our activities, please contact us.



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