



# Annual Report 2024-25



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# Introduction from the CDI President



**Professor Pete Robertson**

*CDI President and Chair  
of the Board*

## I am delighted to present the CDI's 2024-25 Annual report.

It has been both a challenging and rewarding year for the CDI. As the Chief Executive's report covers, we had significant issues with the new website which contributed to the organisation making a large loss in 2024-25. I am pleased that, by the end of the financial year we were with a new website provider and the issues were resolved. Our finances also improved as we contained costs and continued to drive revenue. The Board and I closely monitored the situation and we are pleased that our investments are beginning to benefit members and the organisation.

It has been a rewarding year as we have seen excellent progress in areas I was keen to address when I joined as President. Key among these is the strategic review of how people enter, and progress, within career development. I am delighted that in 2024 the CDI commissioned iCeGS at the University of Derby to undertake a landmark study of the profession, and their report and recommendations were presented to the CDI Board in January 2025.

At that meeting, we agreed a series of projects that the CDI would undertake in collaboration with stakeholders across the profession. The first two were a review of the Qualification in Career Development (QCD) and a review of the Register of Career Development Professionals. I am pleased that the QCD project has completed consultation with stakeholders and is progressing with changes to strengthen the recognition of training in universities.

We also made further progress with strengthening the CDI's governance. Proposals were taken to the 2024 AGM to agree changes to the Institute's governing documents, including the right of all members to vote at general meetings. The final paperwork has been reviewed by legal experts and additional amendments will be presented to the AGM in December 2025.

Finally, I am delighted that we continue to raise the profile of the career development profession among policymakers and the public. We launched the Valuing Careers campaign at the end of 2024, with in-depth research into the lives and careers of 5,000 UK adults. Events at the Houses of Parliament and Stormont – with Scotland and Wales events planned - brought together key organisations and individuals to discuss the challenges people face in their careers, the value they find from careers support and the barriers to accessing that.

The approach also reflected our commitment to encouraging high-quality research across the profession, epitomised by the launch of the Research Directory to make it easier for practitioners and policymakers to find the latest data and insights. It also supported an increased media presence, raising the profile of career development in education and mainstream media.

It has been a pleasure to work with CDI staff, our Chief Executive, and with my fellow Board members over the year. We were delighted to welcome Tariq Sadiq, Pippa Allner and Uuganaa Ramsay as Board-appointed Directors, and the re-election of John Ambrose by the members as a Director.

I commend this report to you and hope it helps highlight the amazing work the Institute does on behalf of the career development profession. I would like to thank all the CDI staff, Board, Associates, volunteers and members for their invaluable contributions over the year.





# Annual Report of the Chair of the Ethics and Professional Standards Committee



**John Walker**

*Chair of the Ethics and Professional Standards Committee*

This report of the Professional Standards Committee covers the period from 1st April 2024 to 31st March 2025, during which the Committee met four times, April 24, September 24, November 24 and January 25. All Committee meetings have been held virtually as a way of maximising engagement and attendance at meetings.

## Update on EPSC Membership

The membership of EPSC has seen some changes over this period, with Mark Yates and Georgie Blackburn having stepped down. EPSC would like to thank Georgie and Mark for all their hard work and commitment during their period on the committee.

A number of elections have taken place and new EPSC members have been elected to represent a range of constituencies. These include.

- John Wallace representing Northern Ireland
- Janet Hutchinson representing Careers education / leadership in schools, colleges and HE
- Collete Cousins representing Wales
- David Roe representing Career guidance/ coaching in the voluntary / community settings

The other significant change during this period was within the role of non-elected CDI EPSC representative. After many years of supporting the work of EPSC, Claire Johnson stood down in October 24. EPSC would like to acknowledge the huge amount of work and dedication that Claire has shown to the work of EPSC. Her expertise and professionalism have been a highlight of the work of EPSC and personally her support has been invaluable.

David Morgan took over the CDI EPSC representative role on an interim basis until CDI internal reviews on roles have taken place.

## Work of the Committee during the year

### Code of Ethics:

The revised Code of Ethics was successfully launched in Oct 2024. The launch consisted of a copy of the revised Code inserted inside the October edition of the Career Matters

magazine. A supporting article explained the changes and encouraged CDI members to raise the profile of the Code across the sector and to actively use it within their day to work.

The launch was followed up with an opportunity to promote the Code at the CDI National Conference. EPSC members were present at the CDI stand to discuss the new code with CDI members, gather feedback and answer questions, as well as share more about the work of the EPSC.

EPSC has continued to focus on the Code of Ethics and its use as a key tool within reflective thinking and as a framework for considering ethical challenges within professional practice.

### Code of Ethics: The building block for other activity

EPSC has been working on a number of connected products that support the understanding and use of the Code of Ethics. These include:



- A client version of the Code of Ethics
- An Employer version which promotes the use of the Code to maintain high ethical standards within the sector and provides an audit tool for employers to use

Both these additions to the Code of Ethics will be available in late 2025.

### Exploring further methods of gaining CDI members' feedback

EPSC has been developing ways in which it can listen to CDI members and gather further feedback on ethical and professional standards within the sector. These methods have included.

- CDI Members' Advisory Council meeting
- The Facebook Community of Practice page
- Planned questions in the summer Big Listen survey
- Establishing a subcommittee to look at the current EPSC Terms of Reference to establish if it can be reworded in parts to describe the need to consult with CDI members

The Terms of Reference changes will be taken forward and will result in a paper to the Board and to the CDI AGM on any recommended changes.



### Career Matters developments

EPSC has secured a regular feature within the Career Matters publication. This has enabled EPSC members to write articles supporting CDI members with reflective practice, ethical questions and the development of case studies. The intention is to continue with this approach as part of the support EPSC can offer to CDI members.

### Supporting the revision of Governance documentation.

EPSC has been involved in the continued work of Avril Hannon on reviewing and further developing the governance documentation of the CDI to establish greater clarity of roles, responsibilities and governance matters.

### EPSC and Professional Development

Members of the Committee have collaborated with the CDI's Head of Professional Development and Standards on a range of professional development updates and developments. This work has included EPSC discussions and agreement where appropriate on:

- Changes to QCD assessment requirements
- Qualifying to work in the sector
- Development of a reflective practice workshop
- Discipline and complaints process review
- CDI 2030 strategy development
- CDI procurement policy review
- 'Getting Qualified' research work



### UK Career Development Awards and CDI Fellowships

The application process and award categories for the UK Career Development Awards were reviewed as part of the continuous development of this important event. EPSC has been involved in this development and has contributed to how the awards will look in 2025.

Together with representatives of the CDI Board, under the chairmanship of the Chair of EPSC, the CDI Fellowship Awards were also part of the work of EPSC. The award of Fellowships to Michele Squire, Janet Hutchinson and Monica Lemecha were agreed and presented at the Awards Dinner in June 2025.

### Future plans

- One of the key aspects of EPSC work will be to launch the client and employer versions of the Code of Ethics.
- In the coming year, the Committee will continue with exploring effective ways to gather feedback from CDI members and to support them in their day-to-day practice.
- The revision of the EPSC Terms of Reference will sharpen up the commitment of EPSC to consult CDI members.
- Regular features in Career Matters will look at ethics and reflective practice.
- Further development of case study work to support CDI members to explore ethical challenges.
- To work with key people to fill constituency vacancies on EPSC.

Any thoughts or contributions from members are always most welcome, both on these topics or any others about which members may have concerns.

### Conclusion

I would like to thank all EPSC members for their time, dedication, expertise and willingness to share ideas and perspectives which add to the quality and robustness of the work of EPSC. A special thank you to Claire Johnson for her role in supporting the work of EPSC and ensuring we are all up to date with developments in the sector.

A thank you to David Morgan for stepping into the CDI rep role and supporting the work of EPSC. I would also like to thank Liz Treadwell for providing the secretarial support for the Committee, and her contribution is much appreciated.

It has been a pleasure chairing EPSC for the last year and I look forward to building on much of what EPSC has done over the last 12 months and to continue to listen to and support CDI members.

# Chief Executive Annual Report



**David Morgan**

*CDI Chief Executive*

## Introduction

With the organisation having built solid financial reserves in past years, 2024-25 was a year where we planned to realise a number of investments – in people, processes and systems. The main investment – the much-needed replacement of our website and member management platforms – launched in November 2023. There were initial bugs, as is common with major new systems, but as we moved into 2024-25 it became clear things weren't working as planned.

Migrating to a new provider and fixing the issues with the website unfortunately dominated the year – in terms of the focus for many of the CDI team including myself, our communication with members and our finances. It was frustrating and disappointing to let our members down, to see our team put under extreme pressure and to be unable to progress the plans we'd made for when the website was in place.

It was also a shame as these issues overshadowed other excellent achievements during the year. This report outlines the impact of the website issues but I hope also demonstrates how much was achieved in the year despite that.

Our finances took a hit due in large part to the added costs of changing website provider - though this was made much easier due to our strategic decision to move to an enterprise-level platform. We had also planned for greater spend based on income growth that wasn't achieved, so we ended the year with a significant loss. That said, we retained significant cash reserves and are looking at a better performance for 2025-26.

This report reflects the outstanding work of the team, all our Associates and volunteers, the Board and the organisations we work closely with, and of course the ongoing support of our members. Together we got through a difficult year in good shape for the future.



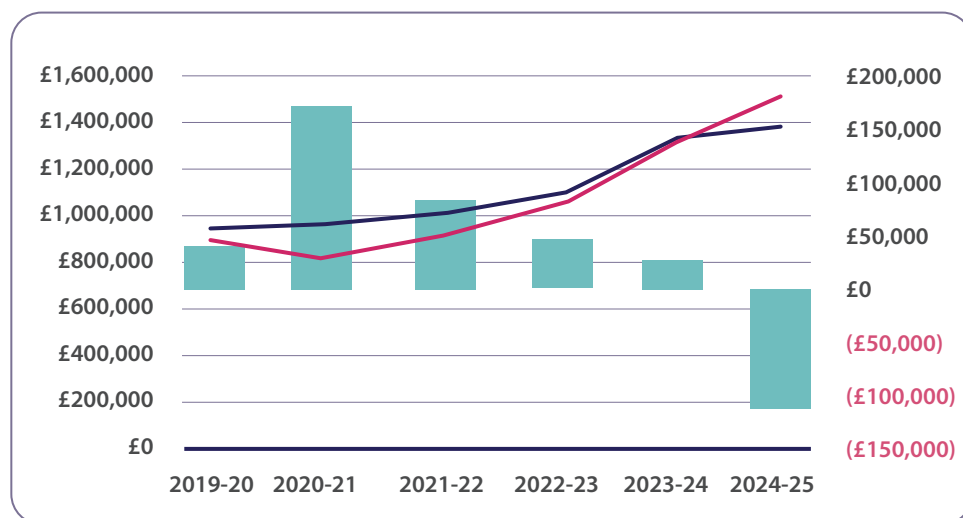
## Financial Overview

After several positive years, the CDI made a significant loss in 2024-25. As previously agreed, we were aiming for breakeven – reinvesting in-year profits in the Institute – but with the additional costs of the website issues and underperformance of income, this wasn't achieved.

Income did increase by 3%, but this was well below budget, and expenditure had been planned on the higher expected income. That said, while we incurred some unbudgeted costs, careful cost management in discretionary areas meant that total expenditure came in below budget.

Year	Income	Expenditure	Surplus
2020-21	£964,116	£817,474	£146,642
2021-22	£980,325	£903,336	£76,103
2022-23	£1,088,760	£1,047,211	£41,185
2023-24	£1,344,093	£1,309,811	£28,769
2024-25	£1,373,383	£1,493,919	-£116,056

### Financial Summary (Surplus on the right axis)



■ Surplus before taxation — Income — Expenditure

Despite the losses, our cash position remains healthy. We did finish the year below the cash reserves target, which had been set much higher in line with the rise in costs, but it is expected to return to above the cash reserve target for 2025-26.

Year	Cash in hand	Reserve target
2020-21	£550,920	
2021-22	£629,865	£240,000
2022-23	£531,693	£300,000
2023-24	£524,031	£345,000
2024-25	£414,155	£450,000



Income

Overall, income increased by 3% year on year, with mixed performance across the main revenue streams.

Subscription and commercial income fell by 2%. While disappointing not to see growth, this is a limited decline given we had to stop accepting new memberships for several months while the website was fixed, had high levels of dissatisfaction with the website issues and were unable to activate membership growth plans. This is also against the backdrop of ongoing cost of living pressures, including a reduction in volumes by two bulk members over summer 2024.

CPD training and events income grew 19%, as the National Careers Leaders’ Conference continued to grow in popularity, and the CDI National Conference returned to being a face-to-face event.

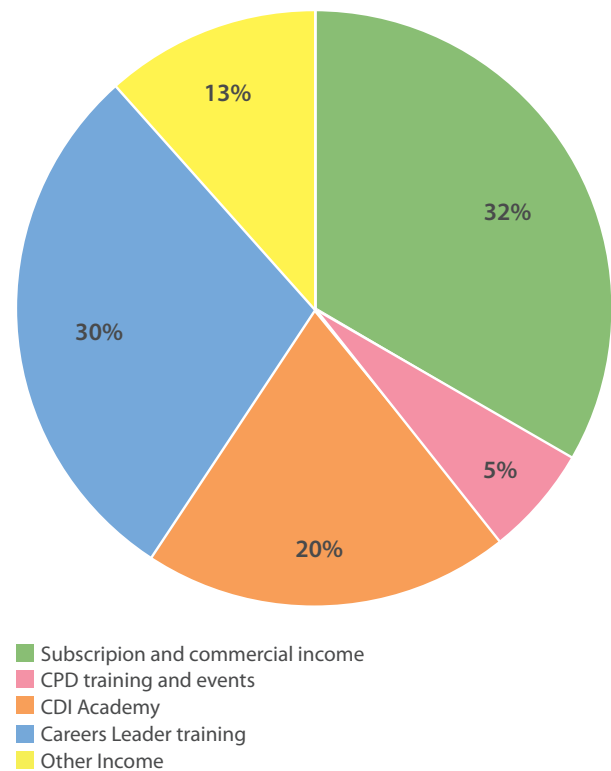
The CDI Academy maintained the level it had grown to the previous year.

Careers Leader training unexpectedly fell back by 11%, despite delivering both the 5-day Careers Leader and 2-day top-up training.

Other income jumped by 100% as it included the contracts for the National Careers Service and the Technical Education Programme funded by Gatsby.

Overall, our aim is to grow income from a range of sources. Income excluding the CEC increased by 11%, more than balancing out a reduction in CEC income so that it accounted for only 30% of revenue (down from 35% in 2023-24).

2023-25 Income distribution

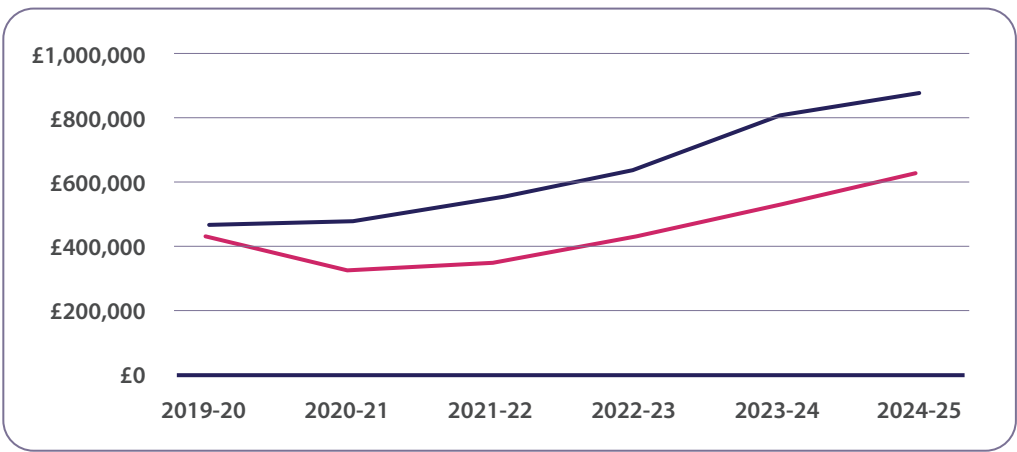


Expenditure

Expenditure increased by slightly less than budgeted for 2024-25, despite the additional costs incurred in addressing the website issues. The full year costs of additional staff in the previous year, plus new staff in 2024-25 pushed up the salary costs and reflects the growing capability in the team.

The costs of CDI Academy training went up, despite income staying flat, as we allocated more training to Associates. Careers Leader training costs fell as income reduced. Other cost rises included the delivery of the NCS and Gatsby contracts, new support for the #WeAreCareers podcast, research for the qualifications review by iCeGS, legal fees for the governance review and publication costs for the Valuing Careers campaign.

Expenditure growth



— Cost of sales — Administrative expenses



Surplus

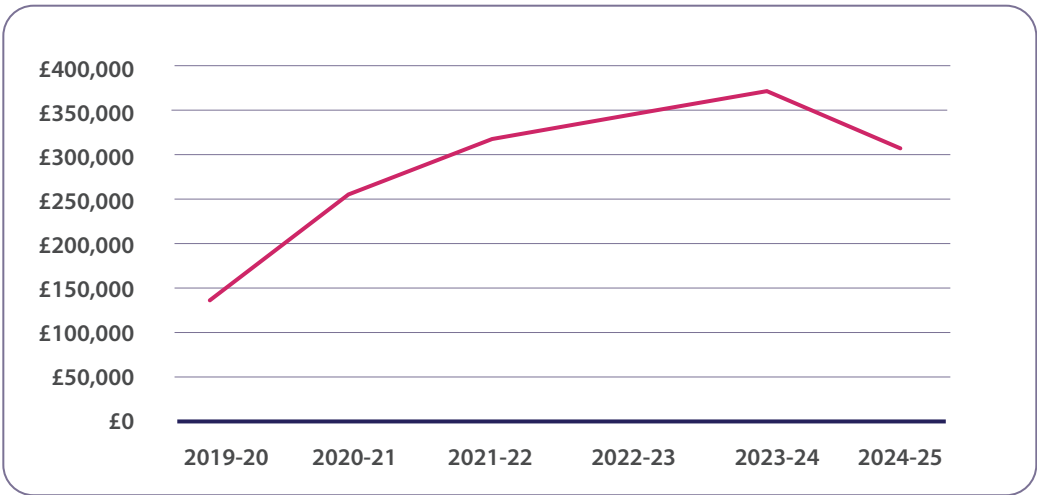
While the budget planned a small loss, the issues with the website and reduction in expected revenue from the CEC contract led to lower than expected income. Despite expenditure being slightly lower than budgeted this led to a loss of £116,056.

Looking forward, the website issues are resolved, we have seen a positive trend in memberships and are working on plans to further improve services. However, we are also expecting further reductions in the value of the CEC contract and there are risks around other bulk members reducing their volumes. Overall, we anticipate that 2025-26 will see a much smaller loss and are working to reduce that to breakeven.

Balance sheet

The losses incurred in the year affected our balance sheet as our net assets reduced from £374,154 to £263,354. Fixed assets grew as we added the website and membership management platforms to our intangible assets, though current assets declined as we held less cash in the bank. Current creditors grew a little and we had no creditors falling due after more than one year.

Net assets



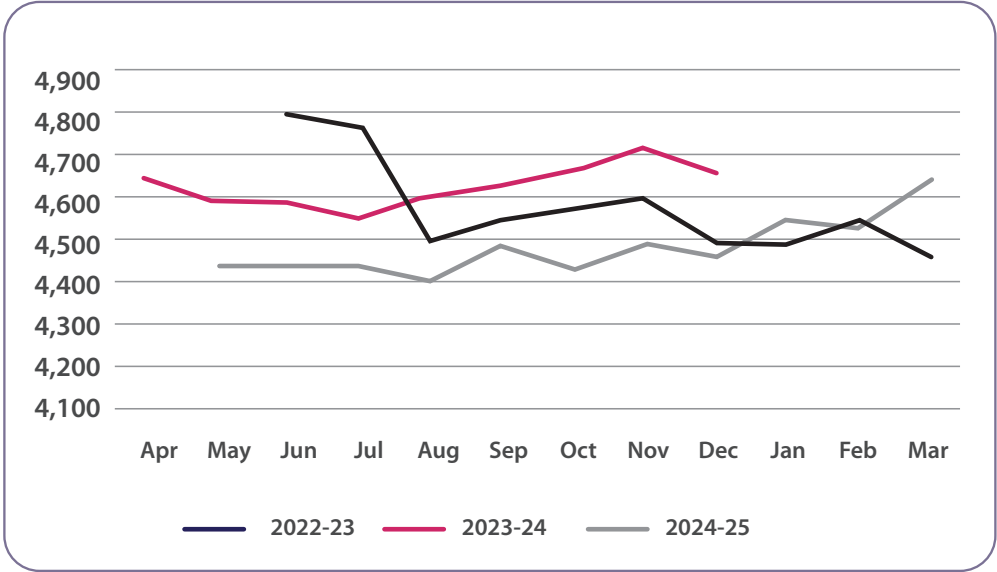
# Broadening memberships

## Memberships

With the issues with the new website, we could not reliably track like-for-like membership volumes from December 2023 until June 2024. At that point we saw a strong uplift in memberships as we processed the backlog of applications that had been paused while we fixed the initial website issues.

Unfortunately, two bulk members reduced their volumes in the summer of 2024, stepping overall member numbers down. Memberships were then flat to the year end. Despite the web issues and cost of living pressures, we maintained these volumes due to our work improving and promoting wider member benefits. Greater media visibility, improved social media activity, relaunching the We Are Careers podcast and launching additional e-learning courses all contributed to a steady level of new members and strong retention of current members.

## Paid membership volumes



## UK Register of Career Development Professionals

Despite Registered members being most affected by the website issues, the number of people on the Register rose from 1,760 in March 2024 to 1,799 by April 2025.



## Fellowships

At the UK Career Development Awards in 2024, two members were awarded CDI Fellowships – Carolyn Parry and Janet Colledge. Congratulates to them both on receiving this prestigious recognition of their ongoing service to the CDI and the career development profession.



## Events

The CDI continues to offer a wide range of high-quality CPD support, including some of the biggest events in the career development calendar, such as:

- The UK Career Development Awards on 18th June 2024 with 112 attendees. Later in the year, we reviewed the award categories and process and launched the new categories for 2025.
- The National Careers Leaders' Conference (NCLC) at the University of Derby on 19th June, hosted with iCeGS. With 216 attendees, the event was at maximum capacity.
- The CDI Annual Lunch on 15th October 2024, attended by the leaders of current and historical careers bodies, CDI Fellows and special guests.
- The National Research Conference for Careers Practitioners run in conjunction with NICEC, iCeGS and AGCAS was held online in March 2025.
- The CPD Conference Scotland in February 2025 was hosted online with University of the West of Scotland, Edinburgh Napier University and Skills Development Scotland.
- The CDI England and Wales Student Conference didn't take place, as a review of feedback indicated that the conference wasn't meeting the needs of attendees.

We continued to offer a programme of free and discounted CPD training for members, including the popular Digital Bytes webinars, EDI sessions and regional meetings. Towards the end of the financial year, we began work on a new CPD programme to launch in 2025-26.



We also expanded to three e-learning courses, with the popular Careers Theory into Practice course by Dr Julia Yates complemented with a course on AI And Ethics by Michael Larbalestier and Marianne Wilson, and a Supervision course by John Walker and Rachel Mallows.

## Member engagement

Other member engagement activities included;

- With Wei Li joining to focus primarily on social media, we uplifted our presence online, with improved materials to promote events, more regular and informative posts and analysis of key channels.
- Oliver Jenkin continued as Editor of the Career Matters magazine, encouraging a mix of well-known contributors and new voices to ensure the magazine remained relevant and valued.
- The Career Development Professionals' Community of Practice on Facebook grew from 1,554 members to 1,670. The forum is very active and continues to offer excellent peer support.
- Pete Robertson, in his role as Scotland Associate, hosted regular online meetings for Scottish members and represented the CDI on the Careers Collaborative.
- CDI Cymru Wales Associate Carolyn Parry hosted a termly forum of stakeholders across Wales and supported Careers Wales with bespoke CPD training. Carolyn stepped down at the end of February 2025 and I would like to thank her for all her work for members and the profession.
- We relaunched #WeAreCareers as a fortnightly podcast, hosted by Chris Webb and Meet Sabiha, widening availability through YouTube and Spotify.



# NATIONAL CAREERS LEADERS' CONFERENCE

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## Strengthening Standards

The CDI continues to support new entrants as they train to gain their qualifications, and those more experienced as they continue to develop their skills, knowledge and ethical practice.

### Strategic Review of qualifications and professionalism

The CDI commissioned iCeGS at the University of Derby to undertake a major review of the routes to qualifications and professional recognition in career development. The research included 22 stakeholder interviews, a survey with 644 responses and four roundtable discussions. The final report, with insights and recommendations, was presented to the CDI Board in January 2025, along with projects to take key recommendations forward. The first two projects subsequently initiated were:

A review of the Qualification in Career Development, involving consultation with the universities offering the QCD and others to explore the role of the QCD and how it can evolve to remain relevant.

A review of the Register of Career Development Professionals, looking at its original purpose versus the expectations of practitioners, employers and policymakers.

The final iCeGS report is available on the CDI website and the projects continued into 2025-26.

### Code of Ethics

The EPSC launched a revised Code of Ethics in October 2024 and began work on a client-facing version and a version for employers of career development professionals. These ensure the Code remains relevant and accessible



### Qualification in Career Development (QCD)

Nottingham Trent University suspended its course from September 2024 and Canterbury Christ Church University wasn't recruiting for the 2025-26 cohort. Both universities reported higher applicant numbers than previous years, but the financial challenges in the universities meant the courses were discontinued. Changes to the assessment requirements were implemented to simplify the approach.

### The CDI Academy

Courses continued to be popular with good volumes of learners for the level 6 qualifications, supporting clients with additional needs and careers coaching. We grew the number of bespoke courses delivered in 2024-25, including in Northern Ireland, to local authorities and organisations such as UCAS.

### Careers Leader Training funded by the Careers & Enterprise Company

The CDI continued to be a key provider of the five-day Careers Leader training and were the exclusive provider of the enhanced 2-day programme. Feedback from learners and the CEC continued to be very positive.

### CPD Newsletters and Resources

The CPD newsletter continues to be produced by CDI Associate Erica Rowell. They are well received and are sent monthly with the archive accessed via the members' area on the CDI website.

### National Careers Service CPD contract

We delivered the contract for CPD training for National Careers Service providers from June 2024. A series of online sessions were designed and delivered, with accompanying resource packs, covering a range of topics requested by the Primes.







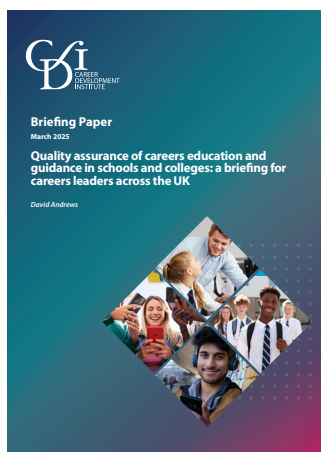
## Research Directory

A key aim is to make it easier for practitioners, policymakers and researchers to find and use existing research. In 2024-25 we launched our Research Directory on the CDI website, showcasing the latest reports, categorised by areas of practice and including summaries of the key research.

## Technical Education programme

The programme, funded by the Gatsby Foundation, aims to ensure careers advisers in schools in England are comfortable supporting young people with choices around technical education pathways. Following a research study to gauge current levels of understanding, a major development was the Technical Education Resource Hub which launched just after the year-end. With qualification reform ongoing, webinars were held with DfE which kept members updated on changes.

## New briefings from COICE



The Community of Interest for Careers Education (COICE) group produced two briefing papers. The first, published in October 2024, looked at work-based learning and development. The second, released in March 2025, provided an overview of quality assurance in careers education and guidance. Both papers provide insight into best practice and a comparison of approaches across the four UK home nations.

## Trotman/CDI Publishing Agreement

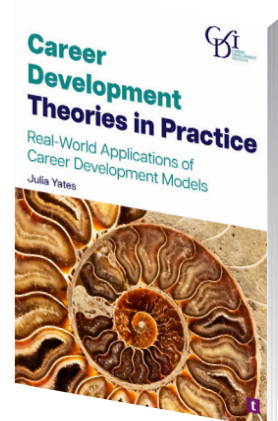
The publishing partnership between the CDI and Trotman Indigo Publishing saw three books published to expand the resources available within the profession. These books were:

The Career Development Handbook: Tristram Hooley, Gill Frigerio and Rosie Alexander.

Career Development and Inclusive Practice: Jules Benton and Chris Targett.

Career Development Theories in Practice: Julia Yates.

Five additional books are expected to be published under the partnership in 2025.



## Mentoring scheme

The 2024 mentoring scheme ended in October. With only 20 mentors and mentees, the scheme will be reviewed to establish whether it meets member needs.



## Influencing change

### Valuing Careers

The key focus in 2024-25 was the launch of the CDI's Valuing Careers campaign. This is our first long-term campaign, designed to raise the visibility of the profession's benefits to individuals, the economy and society, as well as to encourage more people to enter the profession.

The CDI commissioned a survey by YouGov of 5,000 UK adults about their lives, careers, career aspirations and experiences of obtaining careers support. The results were launched at the CDI National Conference in November 2024 then at home nations events at the House of Lords and at Stormont with a talk by Minister Caoimhe Archibald. Events for the Senedd and in Scotland are planned for 2025-26.

The next steps include developing content on the website to attract people to the profession and an employer information pack encouraging investment in their careers staff.

### Policy in England

Following the general election in July 2024, there was a huge amount of policy activity related to career development, education and skills. CDI activities included:

- A pre-election briefing on the positions of the main political parties regarding careers, education, skills and jobs.
- Jane Hubbuck, Deputy Director for careers at the DfE, presented to the CDI National Conference with a video from Minister Jacqui Smith.
- Hosting workshops for DfE at the CDI National Conference and online to support the 1,000 careers adviser policy.
- Responding to the Education Committee's FE and Skills inquiry, the Work and Pensions Committee's inquiry into Reforming Jobcentres, Ofsted's Big Listen consultation and the Curriculum and Assessment Review.

### Policy in Scotland

CDI President and Project Associate for Scotland, Pete Robertson, continued to support the Careers Collaborative in Scotland and input to the Curriculum Improvement Cycle led by Education Scotland. The CDI responded to the consultation for the reform of the post-16 educational system. We also continued to work with Skills Development Scotland while they awaited the outcome of the reforms.

### Engagement in Wales

Our Cymru Wales Associate, Carolyn Parry, continued to support Careers Wales with tailored CPD events and to build the profile of career development through regular forums with attendees from Careers Wales, employers, charities and organisations with an interest in career development.

### Engagement in Northern Ireland

The positive relationship with Careers Service Northern Ireland continued throughout the year, and we are grateful to them and colleagues at the Department for the Economy for their support in planning the event in Stormont. We were delighted that Minister Caoimhe Archibald was able to attend and give a speech, and senior members of the Department for the Economy and Department of Education who presented. We presented at the Careers Services' conference in Cookstown and delivered training for new starters in the Careers Service. We also engaged with Careers Teachers and NISCA.





### Career Development Policy Group (CDPG)

The CDPG held its second parliamentary event on 11th December 2024. The event, an APPG for Skills, Careers and Education meeting arranged by Policy Connect, was titled 'Unlocking Potential: How Careers Guidance Can Fuel Economic Growth'. Chaired by Lord Knight, the roundtable discussion included the CDI presenting its Valuing Careers research and speakers from IES and Speakers for Schools.

The CDPG wrote to the main political parties ahead of the general election and made a representation to the Treasury ahead of the 2024 Budget. The CDPG also submitted evidence to the Further Education and Skills inquiry and the Reforming Jobcentres inquiry.

### Working with the media and other organisations

Other activities included:

- Attended a range of industry meetings including an Into Film roundtable, The Skills Federation's CEO Forum and the advisory group for Discover! Creative Careers.
- Speaking opportunities included the Careers Service Northern Ireland conference, a House of Lords event hosted by Career Connect, Westminster Forum conference on career guidance, Complete Careers conference and the Talentino conference.
- We published two press releases for exam results days with reasonable coverage and had our first article published in FE News under a new arrangement. We published additional articles for National Careers Week, International Women's Day, in HR World and for the Technical Education Hub launch. We also supported the #SoMuchMoreThanTalkingAboutJobs day.
- Following concerns raised on LinkedIn, we contacted BBC Bitesize regarding a video of 'the worst' careers adviser which led to the video being removed and an invitation to attend their live event.
- CDI representatives sit on key advisory and steering groups including the Board of the Quality in Careers Standard and the Careers England Board.

## Working for a fair future

### EDI strategy

We continued to deliver key aspects of the CDI's Equity, Diversity and Inclusion (EDI) strategy, including regular EDI webinars which remain popular. We are also curated profiles of career development professionals for the website, showcasing the diversity of backgrounds and talent across the sector. Following some challenges to EDI abroad and in the UK, the CDI Board reaffirmed the Institute's commitment to EDI and the aim to ensure everyone feels welcome, encouraged and enabled.

### Team development

Claire Johnson retired from the CDI team in October 2024, following an impressive career with the organisation. We are very grateful to Claire for her tremendous work for the Institute and professional development across the sector. Sue Alder was appointed as the new Head of Professional Development & Standards and we began recruitment for a new Senior Professional Development & Standards Manager to replace her role.

We were delighted to welcome Naomi Snelling to the team as Content & Campaigns Manager, Wei Li as Marketing & Social Media Co-ordinator and Luiza de Oliveira as Events & Commercial Administrator. They add to the team to enable us to further maximise member benefits and champion the profession.

Following staff survey feedback, we invested in SharePoint/Teams training for the team, reviewed AI tools and started regular AI training sessions. We also initiated a review of our HR policies and staff contracts.

## Investing in our service

As an organisation we commit to reinvesting our profits in the organisation and the profession. Despite the underperformance of income in 2024-25, we continued to develop our services. The key programme here was the Digital Transformation project.

### Digital transformation

The replacement of our website and membership management system was much needed, shown by our new ability to create new content and services such as the Research Directory, automate processes and improve member communications.

However, the original project didn't deliver as intended and, after trying to resolve issues with our original digital provider, in summer 2024 we decided to change partner. We migrated to IDHL in November and they fixed the most pressing issues by the end of December. We were then able to begin ongoing improvements and additions, such as:

- Restoring the online membership application with an improved user journey to make it easier to sign-up while also encouraging completion of member profile data.

- Beginning a series of content reviews to regularly update content on key pages to ensure the member journey is clear and information and services are easy to access.

The new membership platform, Zoho, has a suite of other features and in late 2024-25 we migrated to their event management platform, ready for the National Careers Leaders' Conference. This gives improved functionality, reduces paper programmes, integrates member data and reduces our costs.

### Phone system

After problems with our phone system caused members frustration with reaching the team, we rolled out a new virtual system that allows calls to be accessed on phones, laptops and mobiles. While this made us more contactable, there were some issues still being resolved by year-end.

## Organising for growth

### Board and Governance

In April 2024 we welcomed Pippa Allner, Tariq Sadiq and Uganaa Ramsay as Board-appointed Directors, and in November 2024 John Ambrose was re-elected as a Director for a second term. At the end of the year we began recruitment for the President Elect, Honorary Secretary Elect, Honorary Treasurer and one elected Board member. I would like to thank Elaine Inglis who stepped down from the Board during 2023-24.

We were also delighted to be joined by new members on the Ethics and Professional Standards Committee (EPSC). Janet Hutchinson represents careers education/leadership in schools and college/HE, John Wallace represents Northern Ireland, David Roe represents the voluntary/community sector and Collette Cousins represents Wales.

The Board continued work on the CDI's governance documents, with the December 2024 AGM approving changes that give all members voting rights. A review of the documents by lawyers will result in additional changes being presented to the 2025 AGM.

### Chartership

The Chartership project made a little progress over the financial year. The internal working group comprising the Honorary Secretary, Chief Executive, two Board members and Head of Professional Development and Standards planned the next steps, while the Chartered Status Advisory Group (CSAG) - with representatives of key career development organisations - held meetings during 2024.

In July 2024 we met the Privy Council to better understand the process and requirements. While the outcome was generally encouraging, a key issue identified was the definition of career development as a 'unique profession'. This work resulted in a draft paper by Nicki Moore but, with other pressures, finalising the position on this and other areas of work have not progressed since the end of 2024. This will need revisiting and refreshing in 2025-26.



## Summary

**There was again a huge amount to be proud of in 2024-25, with excellent progress in many areas. Our two golden threads are to provide benefits that allow our members to best support their clients, and to champion the profession.**

By the end of the year, with the website working effectively, we were already adding new content such as the Research Directory, were working on the Technical Education Resource Hub and had transferred over to a new and better events platform. We had also successfully launched more e-learning courses, grown our main conferences and continued to grow our member communities.

We made even bigger strides forward in championing the profession. The flagship activity was the Valuing Careers campaign, supported by the research of UK adults, as well as a broader and deeper presence in educational and mainstream media. We also looked to the future of the profession with the qualifications and professionalism research and the first projects initiated from that work.

It is only right, though, to also acknowledge the challenges posed to the CDI and members from the website issues. I am very aware that this seriously affected member satisfaction with the CDI and it would have been worse if it wasn't for all the other excellent work we did throughout the year. We are grateful to everyone who stayed with us during those challenging times and I am pleased that we are now able to repay that with a much-improved service.

Looking toward 2025-26, the website will become even more of a hub for the profession with the launch of the Careers News pages providing timely access to all the career development news. The Technical Education Resource Hub is also due

and we continue to make improvements to the usability and services on the site. We have also started work on a major overhaul of our CPD programme, to offer free and discounted CPD based around monthly themes.

The political landscape continues to be very busy and we are proud to have increasingly positive relationships with policymakers and stakeholders within and outside the profession. While we may not always get the change we would like, we will continue to work to ensure policy is well-informed and recognises the professionalism and value of career development.

I would like to thank the CDI team for their huge efforts and continued positivity despite some difficult times during the year, and we couldn't have got through it so well without the support of the CDI Board. We are able to amplify our impact for members and the profession by working with many wonderful Associates, volunteers and partner organisations – both inside and outside career development.

Most of all, I would like to thank all our members who do such amazing work and inspire us to keep striving to offer more. From the practitioners helping young people and adults in many settings, to the researchers, trainers and educators, leaders, creators and policymakers, thank you all for your dedication to the profession and supporting us as your professional body.



**David Morgan**  
Chief Executive



# Unaudited financial statements

For the year ended 31 march 2024

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# President and Chair of the Board statement

**For the year ended 31 March 2025**

The 2024-25 financial year saw the CDI continue to move forward with its role as the professional body for career development, supporting members and championing the profession. In Autumn of 2024 we launched Valuing Careers, a long-term campaign to positively promote public awareness of career development. To support this, we commissioned a YouGov survey of 5,000 UK adults and held launch events in partnership with each of the UK home nation parliaments. We also initiated an important workstream exploring and defining professionalism for the career development sector, kickstarted by CDI funded research conducted by University of Derby (iCeGS).

Our events continue to be a success, with our largest attendance ever at the National Careers Leaders' Conference and an excellent CDI National Conference. Our commercial income was helped by gaining the contract to provide training for the National Careers Service, the Enhanced Careers Leader training for the Careers & Enterprise Company and funding from Gatsby foundation for the Technical Education Pathways programme.

We continued to be highly active in our external stakeholder activities, contributing to numerous consultations and inquiries across the UK. We are a key part of the Career Development Policy Group, are pleased to support the Quality in Careers Standard and link to industry through our engagement at the Skills Federation's CEO forums.

Nonetheless, 2024-25 was a challenging year. We committed much-needed investment to redevelop our website and member-management platform. We have had significant issues with the deployment of the technology, causing issues for members for a prolonged period, taking up considerable staff resource, and delaying the expansion of our services.

The projected budget for 2024-25 was based on the planned successful implementation of the website generating income growth. Website issues led to lower-than-expected income from membership fees, commercial services and CDI Academy training, set against spending based on projected growth. This resulted in a loss for the year.

Fortunately, we have been able to manage this without impacting the core organisation, as we have built healthy reserves over previous years.

During the summer of 2024, we made the difficult decision to change our website partner. We have been extremely pleased with our new supplier – IDHL – who took on the website and membership platforms and completed key fixes for the main areas in December 2024, reducing the impact on members. We further improved the website through to the end of the financial year, though the project cost £75,000 more than budgeted, contributing to a large part of the loss made this year.

The website and membership platforms are now stable and are being continually enhanced, meaning that we are starting

to see the benefits of our investment in terms of supporting our members and raising the profile of the profession.

So, whilst this year has presented challenges, the underlying capability of the Institute is growing and our impact for members and the profession will be further enhanced when we have an effective web presence. We are in a good position to reverse the losses of this year, to invest further in the CDI as the professional body for career development.

I would like to thank all the team and my fellow Board members for their considerable contributions over this year, and to our members for their continued support as we addressed the issues and returned to the level of service you expect.



**Professor Pete Robertson**  
Director

On behalf of the Board  
30 September 2025



## Directors report

### For the year ended 31 March 2025

The directors present their annual report and financial statements for the year ended 31 March 2025.

#### Principal activities

The principal activity of the company continued to be that of membership organisation for career professionals.

#### Directors

The directors who held office during the year and up to the date of signature of the financial statements were as follows:

Mrs N P Moore	
Mr J S Ambrose	
Mrs N J Lawrence	
Mrs A Hannon	
Mrs E Inglis	(Resigned 1 March 2025)
Mr P Robertson	
Ms G Visram	
Ms P Allner	(Appointed 22 April 2024)
Mr U Ramsay	(Appointed 22 April 2024)
Mr T Sadiq	(Appointed 22 April 2024)
Mr J A Walker	

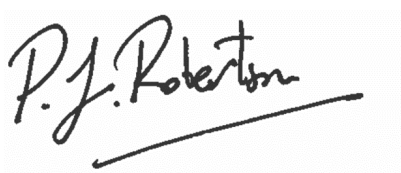
#### Energy and carbon report

We have followed the 2019 HM Government Environmental Reporting Guidelines. We have also used the CHG Reporting Protocol - Corporate Standard and have used the 2020 UK Government's Conversion Factors for Company Reporting.

We have installed smart meters across all sites and increased video conferencing technology for staff meetings, to reduce the need for travel between sites.

#### Small companies exemption

This report has been prepared in accordance with the provisions applicable to companies entitled to the small companies exemption.



**Professor Pete Robertson**  
Director

On behalf of the Board  
30 September 2025

## Report to the directors on the preparation of the unaudited statutory accounts of Career Development Institute

In order to assist you to fulfil your duties under the Companies Act 2006, we have prepared for your approval the financial statements of Career Development Institute for the year ended 31 March 2025 which comprise the income and expenditure account, the balance sheet, the statement of changes in equity, the statement of cash flows and the related notes from the company's accounting records and from information and explanations you have given us.

This report is made solely to the board of directors of Career Development Institute, as a body, in accordance with the terms of our engagement letter dated 14 March 2025. Our work has been undertaken solely to prepare for your approval the financial statements of Career Development Institute and state those matters that we have agreed to state to the board of directors of Career Development Institute, as a body, in this report in accordance with ICAEW Technical Release 07/16 AAF. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than Career Development Institute and its board of directors as a body, for our work or for this report.

It is your duty to ensure that Career Development Institute has kept adequate accounting records and to prepare statutory financial statements that give a true and fair view of the assets, liabilities, financial position and deficit of Career Development Institute. You consider that Career Development Institute is exempt from the statutory audit requirement for the year.

We have not been instructed to carry out an audit or a review of the financial statements of Career Development Institute. For this reason, we have not verified the accuracy or completeness of the accounting records or information and explanations you have given to us and we do not, therefore, express any opinion on the statutory financial statements.

30 September 2025

St David's Court  
Union Street  
Wolverhampton  
West Midlands  
United Kingdom  
W1/1 3JE



## Income and expenditure account

For the year ended 31 March 2025

	2025	2024
	£	£
<b>Income</b>	<b>1,373,383</b>	<b>1,334,093</b>
Cost of sales	(632,828)	(519,885)
<b>Gross surplus</b>	<b>740,555</b>	<b>814,208</b>
Administrative expenses	(861,091)	(789,926)
<b>Operating (deficit)/surplus</b>	<b>(120,536)</b>	<b>24,282</b>
Interest receivable and similar income	4,660	4,842
Interest payable and similar expenses	(180)	(355)
<b>(Deficit)/surplus before taxation</b>	<b>(116,056)</b>	<b>28,769</b>
Tax on (deficit)/surplus	5,256	(5,657)
<b>(Deficit)/surplus for the financial year</b>	<b>(110,800)</b>	<b>23,112</b>

The income and expenditure account has been prepared on the basis that all operations are continuing operations.

## Balance sheet

For the year ended 31 March 2025

	Notes	2025		2024	
		£	£	£	£
<b>Fixed assets</b>					
Intangible assets	3		152,720		145,517
Tangible assets	4		27,332		22,760
			<b>180,052</b>		<b>168,277</b>
<b>Current assets</b>					
Debtors	5	219,836		224,597	
Cash at bank and in hand		414,155		524,031	
		<b>633,991</b>		<b>748,628</b>	
Creditors: amounts falling due within one year	6	(546,718)		(537,729)	
<b>Net current assets</b>			<b>87,273</b>		<b>210,899</b>
Total assets less current liabilities			267,325		379,176
Provisions for liabilities			(3,971)		(5,022)
<b>Net assets</b>			<b>263,354</b>		<b>374,154</b>
<b>Reserves</b>					
Income and expenditure account			263,354		374,154
<b>Members' funds</b>			<b>263,354</b>		<b>374,154</b>

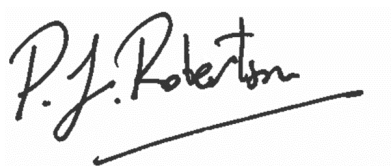
For the financial year ended 31 March 2025 the company was entitled to exemption from audit under section 477 of the Companies Act 2006 relating to small companies.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

The members have not required the company to obtain an audit of its financial statements for the year in question in accordance with section 476.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the board of directors and authorised for issue on 6th November 2025 and are signed on its behalf by:



Mr P Robertson  
Director

Company Registration No. 08226390

## Statement of cash flows

For the year ended 31 March 2025

	Notes	2025		2024	
		£	£	£	£
<b>Cash flows from operating activities</b>					
Cash (absorbed by)/generated from operations	8		(49,043)		89,797
Interest paid			(180)		(355)
Income taxes paid			(4,202)		(9,098)
<b>Net cash inflow from operating activities</b>			<b>(53,425)</b>		<b>80,344</b>
<b>Investing activities</b>					
Purchase of intangible assets			(52,249)		(49,949)
Purchase of tangible fixed assets			(8,862)		(7,078)
Interest received			4,660		4,842
<b>Net cash used in investing activities</b>			<b>(56,451)</b>		<b>(52,185)</b>
<b>Financing activities</b>					
Repayment of bank loans			-		(36,111)
<b>Net cash used in financing activities</b>			<b>(11,111)</b>		<b>(36,111)</b>
<b>Net decrease in cash and cash equivalents</b>			<b>(109,876)</b>		<b>(7,952)</b>
Cash and cash equivalents at beginning of year			524,031		531,983
<b>Cash and cash equivalents at end of year</b>			<b>414,155</b>		<b>524,031</b>

## Statement of changes in equity

For the year ended 31 March 2025

	Income and expenditure
	£
<b>Balance at 1 April 2023</b>	<b>351,042</b>
<b>Year ended 31 March 2024:</b>	
Profit and total comprehensive income for the year	23,112
<b>Balance at 31 March 2024</b>	<b>374,154</b>
<b>Year ended 31 March 2025:</b>	
Profit and total comprehensive income for the year	(110,800)
<b>Balance at 31 March 2025</b>	<b>263,354</b>

# Notes to the financial statements

For the year ended 31 March 2025

## 1. Accounting policies

### Company information

Career Development Institute is a private company limited by guarantee incorporated in England and Wales. The registered office is Ground Floor, Copthall House, 1 New Road, Stourbridge, West Midlands, United Kingdom, DY8 1PH.

### 1.1 Accounting convention

These financial statements have been prepared in accordance with FRS 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" ("FRS 102") and the requirements of the Companies Act 2006 as applicable to companies subject to the small companies regime. The disclosure requirements of section 1A of FRS 102 have been applied other than where additional disclosure is required to show a true and fair view.

The financial statements are prepared in sterling, which is the functional currency of the company. Monetary amounts in these financial statements are rounded to the nearest £1.

The financial statements have been prepared under the historical cost convention. The principal accounting policies adopted are set out below.

### 1.2 Income and expenditure

Income and expenses are included in the financial statements as they become receivable or due. Expenses include VAT where applicable as the company cannot reclaim it.

### 1.3 Intangible fixed assets other than goodwill

Intangible assets acquired separately from a business are recognised at cost and are subsequently measured at cost less accumulated amortisation and accumulated impairment losses.

Amortisation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Online platform – 5 years straight line

### 1.4 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Plant and machinery – 15% reducing balance method

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is credited or charged to surplus or deficit.

### 1.5 Impairment of fixed assets

At each reporting period end date, the company reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have suffered an impairment loss. If any such indication exists, the recoverable amount of the asset is estimated in order to determine the extent of the impairment loss (if any). Where it is not possible to estimate the recoverable amount of an individual asset, the company estimates the recoverable amount of the cash-generating unit to which the asset belongs.

Recoverable amount is the higher of fair value less costs to sell and value in use. In assessing value in use, the estimated future cash flows are discounted to their present value using a pre-tax discount rate that reflects current market assessments of the time value of money and the risks specific to the asset for which the estimates of future cash flows have not been adjusted.

If the recoverable amount of an asset (or cash-generating unit) is estimated to be less than its carrying amount, the carrying amount of the asset (or cash-generating unit) is reduced to its recoverable amount. An impairment loss is recognised immediately in surplus or deficit, unless the relevant asset is carried at a revalued amount, in which case the impairment loss is treated as a revaluation decrease.

Recognised impairment losses are reversed if, and only if, the reasons for the impairment loss have ceased to apply. Where an impairment loss subsequently reverses, the carrying amount of the asset (or cash-generating unit) is increased to the revised estimate of its recoverable amount, but so that the increased carrying amount does not exceed the carrying amount that would have been determined had no impairment loss been recognised for the asset (or cash-generating unit) in prior years. A reversal of an impairment loss is recognised immediately in surplus or deficit, unless the relevant asset is carried at a revalued amount, in which case the reversal of the impairment loss is treated as a revaluation increase.

### 1.6 Cash and cash equivalents

Cash and cash equivalents are basic financial assets and include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

### 1.7 Financial instruments

The company has elected to apply the provisions of Section 11 'Basic Financial Instruments' and Section 12 'Other Financial Instruments Issues' of FRS 102 to all of its financial instruments.

Financial instruments are recognised in the company's balance sheet when the company becomes party to the contractual provisions of the instrument.

Financial assets and liabilities are offset, with the net amounts presented in the financial statements, when there is a legally enforceable right to set off the recognised amounts and there is an intention to settle on a net basis or to realise the asset and settle the liability simultaneously.



**Basic financial assets**

Basic financial assets, which include debtors and cash and bank balances, are initially measured at transaction price including transaction costs and are subsequently carried at amortised cost using the effective interest method unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Financial assets classified as receivable within one year are not amortised.

**Classification of financial liabilities**

Financial liabilities and equity instruments are classified according to the substance of the contractual arrangements entered into. An equity instrument is any contract that evidences a residual interest in the assets of the company after deducting all of its liabilities.

**Basic financial liabilities**

Basic financial liabilities, including creditors, bank loans, loans from fellow group companies and preference shares that are classified as debt, are initially recognised at transaction price unless the arrangement constitutes a financing transaction, where the debt instrument is measured at the present value of the future payments discounted at a market rate of interest. Financial liabilities classified as payable within one year are not amortised.

Debt instruments are subsequently carried at amortised cost, using the effective interest rate method.

Trade creditors are obligations to pay for goods or services that have been acquired in the ordinary course of business from suppliers. Amounts payable are classified as current liabilities if payment is due within one year or less. If not, they are presented as non-current liabilities. Trade creditors are recognised initially at transaction price and subsequently measured at amortised cost using the effective interest method.

**1.8 Derivatives**

Derivatives are initially recognised at fair value at the date a derivative contract is entered into and are subsequently remeasured to fair value at each reporting end date. The resulting gain or loss is recognised in surplus or deficit immediately unless the derivative is designated and effective as a hedging instrument, in which event the timing of the recognition in surplus or deficit depends on the nature of the hedge relationship.

A derivative with a positive fair value is recognised as a financial asset, whereas a derivative with a negative fair value is recognised as a financial liability.

**1.9 Taxation**

The tax expense represents the sum of the tax currently payable and deferred tax.

**Current tax**

The tax currently payable is based on taxable profit for the year. Taxable profit differs from net profit as reported in the profit and loss account because it excludes items of income or expense that are taxable or deductible in other years and

it further excludes items that are never taxable or deductible. The company's liability for current tax is calculated using tax rates that have been enacted or substantively enacted by the reporting end date.

**1.10 Employee benefits**

The costs of short-term employee benefits are recognised as a liability and an expense, unless those costs are required to be recognised as part of the cost of stock or fixed assets.

The cost of any unused holiday entitlement is recognised in the period in which the employee's services are received.

Termination benefits are recognised immediately as an expense when the company is demonstrably committed to terminate the employment of an employee or to provide termination benefits.

**1.11 Retirement benefits**

Payments to defined contribution retirement benefit schemes are charged as an expense as they fall due.

**1.12 Leases**

Rentals payable under operating leases, including any lease incentives received, are charged to profit or loss on a straight line basis over the term of the relevant lease except where another more systematic basis is more representative of the time pattern in which economic benefits from the leases asset are consumed.

**1.13 Foreign exchange**

Transactions in currencies other than pounds sterling are recorded at the rates of exchange prevailing at the dates of the transactions. At each reporting end date, monetary assets and liabilities that are denominated in foreign currencies are retranslated at the rates prevailing on the reporting end date. Gains and losses arising on translation in the period are included in profit or loss.

**2. Employees**

The average monthly number of persons (including directors) employed by the company during the year was:

	2025: Number	2024: Number
Total	27	22

### 3. Intangible fixed assets

	Other (£)
<b>Cost</b>	
At 1 April 2024	172,980
Additions	52,249
At 31 March 2025	225,229
<b>Amortisation and impairment</b>	
At 1 April 2024	27,463
Amortisation charged for the year	45,046
At 31 March 2025	72,509
<b>Carrying amount</b>	
At 31 March 2025	152,720
At 31 March 2024	145,517

### 4. Tangible fixed assets

	Plant and machinery etc (£)
<b>Cost</b>	
At 1 April 2024	41,024
Additions	8,862
At 31 March 2025	49,885
<b>Depreciation and impairment</b>	
At 1 April 2024	18,264
Depreciation charged in the year At	4,289
31 March 2025	22,553
<b>Carrying amount</b>	
At 31 March 2025	27,332
At 31 March 2024	22,760

### 5. Debtors

	2025 (£)	2024 (£)
<b>Amounts falling due within one year:</b>		
Trade Debtors	153,048	158,781
Corporation tax recoverable	4,204	-
Prepayments and accrued income	62,584	65,816
	<b>219,836</b>	<b>224,597</b>

### 6. Creditors: amounts falling due within one year

	2025 (£)	2024 (£)
Trade creditors	44,022	100,277
Corporation tax	-	4,204
Other taxation and social security	22,163	10,532
Other creditors	58,208	41,112
Accruals and deferred income	422,325	381,604
	<b>546,718</b>	<b>537,729</b>

### 7. Members' liability

The company is limited by guarantee, not having a share capital and consequently the liability of elected board members is limited, subject to an undertaking by each elected board member to contribute to the net assets or liabilities of the company on winding up such amounts as may be required not exceeding £1.

## 8. Cash (absorbed by)/generated from operations

	2025	2024
	£	£
(Deficit)/surplus for the year after tax	(110,800)	23,112
<b>Adjustments for:</b>		
Taxation (credited)/charged	(5,256)	5,657
Finance costs	180	355
Investment income	(4,660)	(4,842)
Amortisation and impairment of intangible assets	45,046	27,463
Depreciation and impairment of tangible fixed assets	4,289	3,110
<b>Movements in working capital:</b>		
Decrease/(increase) in debtors	8,965	(45,811)
Increase in creditors	13,193	80,753
<b>Cash (absorbed by)/generated from operations</b>	<b>(49,043)</b>	<b>89,797</b>

## 9. Analysis of changes in net funds

	1 April 2024	Cash flows	31 March 2025
	£	£	£
<b>Cash at bank and in hand</b>	<b>524,031</b>	<b>(109,876)</b>	<b>414,155</b>



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