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Monday 18 October 2010 • QEII Conference Centre, Westminster

CHARITYFINANCE LIVE

Advancing financial leadership in charities



Sam Younger
Charity Commission



Lynne Robb
Cancer Research



Andrew Kakabadse
Cranfield School of Management



Dr Rafael Ramirez
James Martin 21st Century School, Oxford



Richard Weaver
haysmacintyre



Adrian Hancock
Socitm



John Kelly
CCLA



Roger Chester
Lionheart



Michael O'Toole
3SC



Sarah Powley
World Vision



Stephen Nichols
The Pensions Trust



Charles Scott
Age UK



Paul Emery
Zurich



Alyson Pepperill
Institute of Risk Management

The annual leadership & strategy conference for charity finance directors & chief executives

Key topics and discussions include:

- Smarter working practices and better stewardship
- The future vision for consortium working
- Working together with local authorities
- Current thinking and best practice on reserves and financial assets
- How are the issues facing many civil society pension schemes being tackled?
- KPIs and measuring impact
- iXBRL online tax filing requirements
- The future of charity accountability

Organised by:

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"Timely themed, well paced with good speakers"

Richard Hopgood,
Henry Smith
Charity

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"Choice of material was interesting and useful. Certainly keeps one up to date on the complexities of charity finance"

*S Sabanathan,
South London Tamil Welfare*

Under a new government and increasing budgetary cuts, there is much uncertainty around what the future holds for civil society organisations. It is against this backdrop that Charity Finance Live returns again to share enlightening perspectives, cutting edge research and solutions for Finance Directors and CFOs leading in this volatile economy.

Now in its third year, Charity Finance Live strives to bring you the most up to date developments in Charity Finance, both from a regulatory perspective as well as thought provoking case studies.

The 2010 programme will be focusing on how charities can minimise the risks they are facing, while still creating opportunities and reducing costs!

Through a rich variety of case studies and leading experts in pensions, accounting, investment, psychology, futures and scenarios, we have devised a flexible, relevant and exciting programme, which will enable you to tailor your day as you see fit.

"Excellent opportunity to hear views on current issues facing charities and reporting and a good opportunity to network and hear other charities issues"

Anne Naylor, NDNA

Keynote speakers



Lynne Robb, chief financial officer, **Cancer Research**

Lynne joined Cancer Research UK as finance director during its merger in 2002. Soon after joining Cancer Research UK Lynne was appointed executive director finance and over the last eight years she has seen her role expand to chief financial officer and executive director of corporate resources, which includes Legal, Property Services, Finance, Treasury and Procurement for the whole organisation. She is also involved in many of the charity's major change programmes.



Andrew Kakabadse, professor of international management development, **Cranfield School of Management**

Andrew's areas of research cover boards and top teams, the governance of enterprises and the governance of governments, international relations and conflict resolution. He has published 35 books, over 200 articles and 18 monographs.



Sam Younger, chief executive, **Charity Commission**

Sam Younger has been appointed as chief executive of the Charity Commission from 1 September 2010. His previous roles include founding chair of the Electoral Commission, director general of the British Red Cross, and managing director of the BBC World Service.



Dr Rafael Ramirez, senior fellow in futures at the Institute of Science, Innovation & Society, **James Martin 21st Century School, Oxford**

Rafael is also co-chairman of the World Economic Forum's Global Agenda Council on Strategic Foresight. Rafael has carried out pioneering work in the aesthetics (attractiveness or repulsion) of business, work, and organisation; the interactive design of strategy and value creation, and how scenarios work. He has published six books and many chapters and papers on these subjects.

Advisory panel



Rebecca Bower
head of finance
Royal Botanic Gardens, Kew



Chris Harris
resources director
CIPFA



Lynne Robb
CFO
Cancer Research UK



Colin Simon
business director
Comic Relief

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Early bird discount

Save £79 when you book by 27 August 2010

09:00	Registration & coffee		
Welcome to Charity Finance Live			
09:40	Welcome and opening remarks		
	 <p>Daniel Phelan editor Charity Finance</p>		
Opening plenary			
09:45	One stop update on the Charity Commission's Focus & Developments for 2010/2011		
	 <p>Sam Younger chief executive Charity Commission</p>		
10:25	Transit time to move between sessions		
Streamed sessions			
	Stream A	Stream B	Stream C
10:30	<p>The REAL risks for charitable and public service organisations As budgets come under huge pressure, what are the REAL risks for charities and voluntary groups, and what can they do to minimise their impact? What will the future hold for philanthropy and fundraising? Can public service delivery partnerships with local authorities survive the changes ahead, and what does this mean for the people who rely on these services, not just in the aftermath of the immediate cuts, but throughout the 'long tail' of recovery?</p>  <p>Paul Emery head of community and social organisations Zurich</p>  <p>Alyson Pepperill director Institute of Risk Management</p>	<p>The Charity SORP – endangered species?</p> <ul style="list-style-type: none"> · Where do we currently stand with the UK SORP? · What option is going to be the most imminent and likely for charity annual accounts? · Dealing with allocation of costs and cost transparency between fundraising and charitable activities costs · The future of charity accountability  <p>Richard Weaver partner haysmacintyre</p>	<p>Working together with Local Authorities</p> <ul style="list-style-type: none"> · Forging an open and fair relationship between civil society organisations and local authority · Managing fair pricing for services as well as managing spending cuts – how will this be achieved? · How does the government see the relationship between civil society suppliers and local government?  <p>Adrian Hancock managing director Socitm</p> <p>Mike Weston head of ICT & procurement Telford & Wrekin Council</p>
11:10	Morning coffee		
11:40	<p>Reserves and financial assets : current thinking and best practice <i>Do the assets on your balance sheet reflect the variety of purposes for which you hold reserves, and the range of risks you face?</i></p> <p>John Kelly and Heather Lamont discuss how to ensure that cash and investment management is aligned with your reserves policy.</p>  <p>John Kelly head of client investment CCLA</p>  <p>Heather Lamont client investment director CCLA</p>	<p>iXBRL online filing requirements</p> <ul style="list-style-type: none"> · Detailing the implications for charities fulfilling compulsory online filing of tax returns · What conversion software will be needed? · Timescale and set up times  <p>Roger Chester finance director Lionheart</p>  <p>Richard Metcalfe iXBRL project director Arkk Solutions</p> <p>Jeff Smith HMRC</p>	<p>Collaborative working - enabling extra services and cost saving</p> <ul style="list-style-type: none"> · What are the opportunities for charities? · Delivering contracts for the third sector · How can a partnership approach work in practice? · The future vision for consortium working  <p>Michael O'Toole chief executive 3SC</p>




Exhibition stands are available

please contact: Phil Bishop, 020 7819 1215, phil.bishop@civilsociety.co.uk

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12:20 Transit time to move between sessions


12:25	<p>Making risk management work for you and turning it into a powerful tool for your organisation</p> <ul style="list-style-type: none"> · Getting to grips with the risks your organisation is facing · Moving away from purely a risk register and paper chasing · Adopting an effective risk framework that will enable you to achieve your objectives  <p>Sarah Powley finance & risk director World Vision</p>	<p>Approaching pension deficits and choosing the right scheme for your organisation (Case Study based)</p> <ul style="list-style-type: none"> · What are the main issues facing many civil society pension schemes? · How are the issues being tackled? · The best investment options out there · Gearing up for National Employment Savings Trust (NEST)  <p>Stephen Nichols chief executive The Pensions Trust</p>	<p>KPIs and measuring impact - what exactly is driving your organisation?</p> <ul style="list-style-type: none"> · Working out what to measure and getting it right · Educating people to buy into and understand performance measurement · Turning budgets into targets · Investing in the right technology · Effectively measuring impact and gaining huge insights into donor quantities · Avoiding getting KPIs wrong  <p>Charles Scott group financial director Age UK</p>
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13:05 Lunch

Plenary


14:15	<p>Smarter working practices: How can FDs and CFOs reduce costs but still deliver on objectives and make an impact</p> <ul style="list-style-type: none"> · Leading in a volatile economy and dealing with the challenges this brings · Creating opportunities while reducing costs – how do you make the balance? · Closer working/stronger ties · Better stewardship  <p>Lynne Robb chief financial officer Cancer Research</p>
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Plenary

14:50	<p>Improving the performance of top executives and top executive teams</p> <ul style="list-style-type: none"> · Leading for success · Conflict resolution · Study of boardroom effectiveness and governance practice  <p>Andrew Kakabadse professor of international management development Cranfield School of Management</p>
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15:25 Afternoon coffee

Final plenary

15:50	<p>Radically changing business models and finding solutions to the great challenges of our time</p> <ul style="list-style-type: none"> · What is the essence of 'turbulence' that depicts the environment that organisations are currently operating in? · How do organisations address the challenges of our time?: · What aspects regarding the nature of 'value' must be reconsidered?  <p>Dr Rafael Ramirez senior fellow in futures at the Institute of Science, Innovation & Society James Martin 21st Century School, Oxford</p>
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16:25 Chair's closing remarks

16:30 Networking drinks reception sponsored by Zurich

18:00 Close of conference

"Stimulating programme"

*Robert Poole,
NI Assoc Mental
Health*

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	Early bird bookings received by 27 August 2010	Bookings received by 17 September 2010	Bookings received after 17 September 2010
Not-for-profit delegate	£170 + VAT (£199.75)	£199 + VAT (£233.83)	£249 + VAT (£292.58)
Commercial delegates	£420 + VAT (£493.50)	£449 + VAT (£527.58)	£499 + VAT (£586.33)

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Visit www.civilsociety.co.uk/hotels for details

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Mr Mrs Ms Miss Other

First name _____

Surname _____

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I am unable to attend in person but would like to purchase the event documentation for £95 (no VAT).

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Please give details of any access or dietary requirements

Charity Finance Live

18 October 2010

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	10:30-11:10	11:40-12:20	12:25-13:05
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Stream C	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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