ONLINE TRAINING FOR CHARITY LEADERS

2025 PROGRAMME

CIVILSOCIETY media

GOVERNANCE & LEADERSHIP

CharityFinance

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2025 TRAINING DATES

JUNE

Board Leadership: High Performance Boards	16th-17th June 2025
How to Recruit and Retain a Diverse Board	18th June 2025
Understanding Governance Stage 2: Governance in Practice	24-25th June 2025

JULY

Reserves Policy Training	1st July 2025
Understanding Governance Stage 1: The Trustee Role	10th-11th July 2025

SEPTEMBER

Understanding Governance Stage 1: The Trustee Role	10th-11th September 2025
Journey to Net Zero	15th September 2025
Best Practice Reporting	16th September 2025
Contracts and Contracting for Charities	23rd September 2025
Preventing Charity Fraud	25th September 2025

OCTOBER

Data Protection Training for Charities	21st October 2025
Risk Management for Trustees	24th October 2025

NOVEMBER

Understanding Governance Stage 1: The Trustee Role	4th-5th November 2025
Understanding Governance Stage 2: Governance in Practice	11th-12th November 2025
The Art of Being an Effective Chair	18th-19th November 2025
Finance for Trustees	20th November 2025

THE ART OF BEING AN EFFECTIVE CHAIR

The role of the chair of the board or a committee is more demanding and can be more complex than most people realise. Whether you are an existing chair or aspiring to the role, this course will help you to understand what it takes to chair well and to ensure that your board governs effectively. You will work through various case studies and scenarios to help develop your practical skills and prepare for future challenges.

Discounts available

Subscribers to Governance & Leadership magazine can save £40. Find out more about this publication at civilsociety.co.uk/gandl

2025 DATES

16-17 October

TIMES

DAY 1: 10AM-2PM

DAY 2: 10AM-2:30PM

PRICES

Charity rate: £235

Charity subscriber rate: £195

Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

PROGRAMME SUMMARY

FUNDAMENTALS OF GOVERNANCE

- What every chair of the board or every chair of a committee needs to have a deep understanding of the roles

ROLE OF THE CHAIR

- Requirements of the role
- Characteristics of a good chair
- Do's and Don'ts

RELATIONSHIPS WITH TRUSTEES

- Keeping board/committee members engaged and interested in governance
- Dealing with conflict including difference between tension and conflict

PLANNING

- Planning the work of the board and committees
- Preparing for meetings
- The art of chairing a meeting
- Getting behaviours right at meetings

COURSE LEADERS:

Jon Williams

Jon served for five years as Charity Commissioner and, more recently, for eight years as trustee and Vice Chair of the Association of Chairs.

Meg Wright

Meg is a consultant and interim CEO specialising in voluntary sector business, leadership and governance.

BEST PRACTICE REPORTING

In the current economic climate where fundraising from funders and the public alike is a tough ask, it is important that you sell your charity in the best possible light. We all know that funders will look at your statutory accounts and therefore they need to reflect well on your organisation to provide key messages in a way that encourages them to fund you. Our half day online course will give the tips on best practice reporting in the sector and show you how to think about your Trustees report differently.

Discounts available

Subscribers to Charity Finance magazine can save £40. Find out more about this publication at civilsociety.co.uk/cfmag

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16 September

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PROGRAMME SUMMARY

STRATEGY, OBJECTIVES AND 'TELLING YOUR STORY'

- What makes a Trustees report interesting and informative for the reader?
- Presenting information in a succinct way
- Challenges in reporting against the requirements of the Charities SORP
- Preparations for forthcoming changes to the SORP

RISK

- Disclosure examples of risk statements
- Looking at wording to ensure risks are appropriately summarised

OPTIONAL DISCLOSURES AND EVOLVING TRENDS

- Recent examples have included areas such as EDI and staff disclosures, fundraising disclosures, ESG and climate change.

RESERVES POLICES

- Explaining reserves in a way that is complimentary with the strategy
- Examples of best practice and discuss the key attributions in building a reserves policy narrative for disclosure

COURSE LEADERS:

Helena Wilkinson, partner head of charities, Price Bailey

Helena is a charity specialist having worked with in the sector for over 30 years. She was Vice-Chair of ICAEW Charity Community and is a recognised charity expert.

Suzanne Goldsmith, director, Price Bailey

Suzanne is a qualified chartered accountant and Director at Price Bailey and has worked as an auditor and advisor to the charity and not for profit sector for 20 years.

BOARD LEADERSHIP: HIGH-PERFORMANCE BOARDS

Gain support in tackling the high-level challenges and personnel issues impacting your board.

Whether you are a new or experienced chair or CEO, this course will help you in your role of building a high-performing board. You'll receive valuable insights into the key areas of board dynamics and provide you with fresh ideas to keep your board moving forward.

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16-17 June

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PROGRAMME SUMMARY

INTRODUCTION

- The changing environment in which trustees and charities have to operate
- Ensuring a deep understanding by Chair and CEO of the fundamentals of governance

ROLE AND EXPECTATIONS OF CHAIRS

- The chair's leadership role: what the chair can and cannot do
- Respecting the collective authority and responsibility of trustees

ENSURING BOARDS FULFIL THEIR GOVERNANCE ROLE

- Trustees' role and the chair's and CEO's relationship with trustees
- Success and failure of organisations – the link with governance

MAKING INFORMED DECISIONS

- Ensuring the board gets the information it needs for good governance
- When too much detail is dangerous – when detail could be important
- What should be in a CEO's report to the board
- Basic rules for board papers

CHAIR/CEO AND CEO/BOARD RELATIONSHIP

- Holding the CEO to account
- Behaviours that can damage the relationship

COURSE LEADER: Susan Daniels OBE

Susan has been chief executive of the National Deaf Children's Society since 1992. In 2006, she was awarded an OBE for services to deaf children and their families. Susan was a Commissioner of the Disability Rights Commission from 2003 until its merger with the Commission for Equality and Human Rights in 2007 and until 2010 she was Chair of the UK Council on Deafness. Currently Susan is Chair of the NHS Newborn Hearing Screening Programme Quality Assurance Advisory Group and Chair of Groundbreakers.

CONTRACT TRAINING FOR CHARITIES

For a charity entering into a contract with any other party, there are a number of key factors to consider. In this half-day session, you will gain expertise on managing charity contracts effectively to ensure risks are mitigated, all parties fully understand what has been agreed and what to do if a dispute arises. Our expert course leaders will also guide you through some common and important contract clauses which are often poorly understood.

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2025 DATES

23 September

TIMES

10AM-4PM

PRICES

Charity rate: £159

Charity subscriber rate: £119

Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

PROGRAMME SUMMARY

CONTRACTS AS A TOOL FOR MANAGING RISK

- Different types of contract, how they are entered into, and how to approach them
- Assessing and managing the risks in any contract

THE IMPORTANCE OF CLARITY

- How clear drafting in key commercial provisions can make all the difference in the success of a contract

EASY WINS AND COMMON QUESTIONS IN CONTRACT TERMS

- Navigating common and important clauses which are often misunderstood
- Understanding key contractual provisions which, if done right, can help manage most contractual risks

CONTRACT MANAGEMENT AND USING YOUR RIGHTS

- Managing relationships with your suppliers
- Why contracts shouldn't only be referred to when things go wrong

COURSE LEADERS:

Ed Rimmell, partner, VWV

Ed specialises in commercial contracts and projects, from long term supply and services contracts, to contractual joint ventures, partnering agreements, framework agreements and terms and conditions.

Shivaji Shiva, partner, VWV

Shivaji has 20 years' experience working in the charity law sector advising staff and board members of charities, and other not-for-profit organisations.

DATA PROTECTION TRAINING FOR CHARITIES

It is important for every charity leader to ensure their organisation is fully compliant with the latest data protection regulations. This half-day course will guide you through the key points to consider, asses what your organisation is currently doing and what further measures you could consider putting in place. Furthermore, you will examine case studies of best practice to help you learn how to avoid some common data protection pitfalls.

Discounts available

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2025 DATES

21 October

TIMES

10AM–1:15PM

PRICES

Charity rate: £159

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Corporate subscriber rate: £300

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PROGRAMME SUMMARY

DATA PROTECTION COMPLIANCE OVERVIEW

- What does a compliant charity look like?
- What are the key aspects to ensuring continued compliance?

POLICIES AND DOCUMENTS

- What do you need – what documentation is required under the UK GDPR?
- What are "nice to haves"

CONTRACTS AND DATA SHARING

- What types of data sharing exist and what are the rules?
- When is a data sharing a legal requirement?
- What are the risks of not having agreements in place?

INDIVIDUAL RIGHTS

- Subject access, rectification, erasure, portability, restriction, objection

PITFALLS AND SAVIOURS

FUNDRAISING AND OPTING IN AND OUT

- What are the rules?
- What does the future look like? Are the rules likely to change?

COURSE LEADER: Claire Hall

Claire is a legal director at VWV who provides advice on all areas of data protection compliance.

Claire advises charities on a wide range of issues including data sharing, transparency obligations, marketing and fundraising compliance and data subjects' rights. She has developed data protection documentation for charities, such as, privacy notices and policies. Claire has particular expertise advising on complex subject access requests and has supported charities with their response to data breaches.

FINANCE FOR TRUSTEES

How confident are you that you really understand your charity's finances? It's a complicated business, what with managing different types of funds and income, the accounting and reporting rules, as well as dealing with tax and VAT.

This course, led by the team from leading accountancy firm BDO, will give you the tools to get to grips with how all that works in your own organisation, and includes time to chat with fellow trustees over the practicalities and challenges you face.

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2025 DATES

20 November

TIMES

10AM-4PM

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PROGRAMME SUMMARY

ACCOUNTS

- What is a SORP?
- What's unusual in charity accounting?
- How to understand charity accounts

ANNUAL REPORTING – PUBLIC BENEFIT AND RESERVES

- What should be in annual reports?
- Trustees' responsibilities

BUDGETS & FINANCIAL INFORMATION FOR TRUSTEES

- Essential elements of a good budget
- Importance of setting financial targets, trend analysis, risk assessment etc

TAX

- A whistle stop tour for trustees of how tax affects charities

AUDIT AND INVESTMENTS

- The role and responsibilities of the auditor
- The board's relationship with the auditor
- Types of investments a charity can make

RISK AND FRAUD

- What do boards need to do about risk?
- Preventing and dealing with fraud

COURSE LEADER: Don Bawtree

Don has been involved in charities and financial governance for over 30 years. Professionally he lead the BDO charities team before stepping down to act as a sector senior adviser with the firm. He has audited charities large and small, internationally and locally. He has carried out investigations and expert witness work, written extensively on charity finance, and run training courses. Personally he has been and/or is a volunteer, trustee, Audit Committee chair, and treasurer.

HOW TO RECRUIT AND RETAIN A DIVERSE BOARD

Join this online training course to better understand the importance of diversity and lived-experience on charity boards. Over the course of the morning you will learn about the common challenges involved in recruiting and retaining diverse board members and gain practical solutions for tackling these challenges. This interactive session includes plenty of opportunities to discuss experiences and key topics with fellow charity delegates.

Discounts available

Subscribers to Governance & Leadership magazine can save £40. Find out more about this publication at civilsociety.co.uk/gandl

2025 DATES

18 June

TIMES

10AM-1PM

PRICES

Charity rate: £159

Charity subscriber rate: £119

Corporate rate: £400

Corporate subscriber rate: £300

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PROGRAMME SUMMARY

THE CURRENT TRUSTEE LANDSCAPE

- Facts and figures about trustees
- The composition of an 'average' board
- Groups that are under-represented on many boards

WHY DIVERSITY, LIVED EXPERIENCE & INCLUSION MATTERS ON YOUR BOARD

REVIEWING YOUR CHARITY'S BOARD COMPOSITION FOR SKILLS AND DIVERSITY

- Why data is important and how to collect and analyse it responsibly

CHALLENGES AND OPPORTUNITIES

- Reaching those less likely to seek a trusteeship

RECRUITING FOR SKILLS, LIVED EXPERIENCE AND DIVERSITY

- Things to think about and avoid when succession planning
- Running a successful recruitment campaign

RETAINING A DIVERSE BOARD

- Assessing your board's culture
- Identifying strengths and areas to work on
- Effective inductions and ongoing support for retention

COURSE LEADER: Claris D'cruz

Claris D'cruz is a governance consultant and trainer. She has over 25 years' experience as a charity lawyer advising charities and not-for-profit organisations on governance matters. She has experience of successfully supporting boards and committees to recruit for skills, diversity, and knowledge, as well as for professional and lived experience. She also has over 15 years experience in a range of voluntary sector leadership roles including as a charity trustee and NED.

JOURNEY TO NET ZERO

Within the charity sector, it is important to be working towards a sustainable future with an impactful ESG strategy. By attending this course, you will be better equipped to identify and prioritise the ESG issues most relevant to your charity and ensure your net zero plans align with your organisation's overall strategy. In addition, you will learn how to incorporate net zero considerations into your charity' s reporting.

Discounts available

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2025 DATES

15 September

TIMES

10AM-1PM

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Corporate subscriber rate: £300

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PROGRAMME SUMMARY

ESG AND MATERIALITY ASSESSMENT

- How to determine key focus areas
- Prioritising issues relevant to the charity, its stakeholder and its purpose

NET ZERO IN THE CONTEXT OF ESG

- What is 'net zero'?
- Key considerations towards achieving 'net zero'

NET ZERO AND ESG STRATEGY

- The benefits of having an articulated plan for determining a net zero and ESG strategy
- How net zero and ESG link to your charity's overall strategy and plans

NET ZERO AND ENVIRONMENTAL REPORTING AND ASSURANCE

- Best practice examples of environmental reporting from the charity sector and beyond

COURSE LEADERS:

Daniel Chan, partner, PwC

Daniel is a partner at PwC with extensive experience of working with charities and he leads the firm's thought leadership for the charity sector. He is Chair of the ICAEW Charity Committee, a member of the Charities SORP Committee and a member of the CIPFA Charities and Public Benefit Entities Forum.

Paisley Ashton Holt, director, PwC

Paisley has supported organisations with their ESG and Net Zero challenges for over 12 years. She specialises in ESG strategy, environmental and social impact measurement, and climate change mitigation and resilience.

PREVENTING CHARITY FRAUD

As a charity leader, how aware are you of fraud and financial crime and do you have the controls in place to handle a fraudulent incident?

Whether you are a trustee, chief executive, finance director or charity advisor, it is important hold responsibility for preventing charity fraud. During this training session, you will gain an understanding of the different types of fraud, fraud prevention measures and dealing with incidents as they arise.

Discounts available

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2025 DATES

25 September

TIMES

10AM-1PM

PRICES

Charity rate: £159

Charity subscriber rate: £119

Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

PROGRAMME SUMMARY

WHY YOUR CHARITY MAY BE SUSCEPTIBLE TO FRAUD

- Exploring factors that make charities vulnerable
- Who may defraud your charity and why
- Why charities and experts are predicting a rise in charity fraud

CHARITY FRAUDS AND FINANCIAL CRIMES TO BE AWARE OF

- Internal and external fraud risks

FRAUD PREVENTION MEASURES

- Risk management
- Controls, procedures, policies and reviews
- The golden thread
- Finding support and guidance

DEALING WITH A FRAUD OR SUSPECTED FRAUD

- Roles and responsibilities in handling the incident
- When to report a fraud to the Charity Commission
- Other regulators and agencies to consider informing
- Understanding the impact of fraud
- Learning lessons and preventing recurrences

COURSE LEADER: Claris D'cruz

Claris D'cruz is a governance consultant and trainer. She has over 25 years' experience as a charity lawyer advising charities and not-for-profit organisations on governance matters. She has experience of successfully supporting boards and committees to recruit for skills, diversity, and knowledge, as well as for professional and lived experience. She also has over 15 years experience in a range of voluntary sector leadership roles including as a charity trustee and NED.

RESERVES POLICY TRAINING

Reserves are an integral part of any charity's financial strategy and during recent economic uncertainty, many charities have had to rely on their reserves in order to continue operating effectively.

This half-day course has been designed to help charity finance professionals develop a reserves policy that meets the requirements of the Charity Commission and SORP but which is also focused on financial risk and forms an integral part of the charity's financial strategy.

Discounts available

Subscribers to Charity Finance magazine can save £40. Find out more about this publication at civilsociety.co.uk/cfmag

2025 DATES

1 July

TIMES

10AM-1:15PM

PRICES

Charity rate: £159

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Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

PROGRAMME SUMMARY

INTRODUCTION TO RESERVES

- Why reserves are needed
- Charity Commission expectations/definitions
- What to disclose
- Relationship between reserves and working capital

DEVELOPING A COMPLIANT RESERVES POLICY

- Interactive case study and feedback

COMMON APPROACHES TO RESERVES POLICIES

- A critical appraisal of how many charities approach reserves policies (with real life examples)

AN ALTERNATIVE RISK FOCUSSED APPROACH

- Understanding financial risk
- Which risks can reserves be expected to manage and which not

COURSE LEADER: Jonathan Orchard

Jonathan specialises in advising the charity sector. He combines a board portfolio of audit clients with a particular specialism on the international development sector. He has worked with many of the leading international NGOs providing internal audit and risk management support. He has been a trustee for the last 10 years – currently with INTRAC where he is treasurer and chair the finance and audit committee.

UNDERSTANDING GOVERNANCE STAGE 1: THE TRUSTEE ROLE

Whether you are new to trusteeship or more experienced in the role, it is important to have a comprehensive understanding of the responsibilities of the board. This course examines models of governance, the relationship between governance and management and how governance is linked to organisational successes and failures.

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2025 DATES

10-11 July
10-11 September
4-5 November

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PROGRAMME SUMMARY

INTRODUCTION TO THE ROLE

- The changing environment in which trustees and charities have to operate
- CC3 – Duties of trustees

WHAT IS GOVERNANCE?

- The relationship between governance and management
- Trustees' role description
- Success and failure of organisations and the link with governance
- Three different models of governance and what each has to offer

PLANNING THE WORK OF THE BOARD

- Why planning of the board work programme is vital to help trustees fulfil their duties and responsibilities
- One way to plan the work of the board

RELATIONSHIPS WITH YOUR CHIEF EXECUTIVE AND CHAIR OF TRUSTEES

- Getting the right balance between support and constructive challenge

COURSE LEADERS:

Jon Williams

Jon served for five years as Charity Commissioner and, more recently, for eight years as trustee and Vice Chair of the Association of Chairs.

Meg Wright

Meg is a consultant and interim CEO specialising in voluntary sector business, leadership and governance.

Lynn Cadman

Lynn has nearly 20 years' experience in the sector, including seven years at the Charity Commission, and provides governance consultancy advice and training to charities.

UNDERSTANDING GOVERNANCE STAGE 2: GOVERNANCE IN PRACTICE

Designed for experienced trustees, secure in their knowledge of the governance processes and what being a trustee entails, 'Governance in Practice' builds on the expertise gained from the stage 1 course 'Understanding Governance: The Trustee Role,' focusing on practical solutions to the challenges you face. This course covers a wide range of governance issues and aims to help you improve the overall effectiveness of your board.

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2025 DATES

24-25 June

11-12 November

TIMES

Day 1: 10AM-1PM

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PROGRAMME SUMMARY

INTRODUCTION

- Brief reminder of the fundamentals of governance

REFRESHING THE BOARD – IDENTIFYING NEW TRUSTEES

- What is your role in identifying potential trustees?
- Once elected/appointed, ensuring new trustees receive appropriate induction and support

BOARD BEHAVIOURS AND DEALING WITH PEOPLE PROBLEMS

- Spotting the signs of a deteriorating relationship between the CEO and the board

DEALING WITH RISK STRATEGICALLY AND SYSTEMATICALLY

- Identifying and managing strategic risk without getting risk averse
- Your role in dealing strategically and systematically with risk

DEVELOPING A LEARNING ORGANISATION

- Reviewing the performance of the CEO, chair and trustees
- Reviewing the effectiveness of the board and committees

COURSE LEADERS:

Meg Wright

Meg is a consultant and interim CEO specialising in voluntary sector business, leadership and governance.

Susan Daniels OBE

Susan has been chief executive of the National Deaf Children's Society since 1992. Currently Susan is Chair of the NHS Newborn Hearing Screening Programme Quality Assurance Advisory Group and Chair of Groundbreakers.

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