



# ONLINE TRAINING FOR CHARITY LEADERS 2026 PROGRAMME

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 CIVILSOCIETY  
media

GOVERNANCE  
& LEADERSHIP

CharityFinance

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## 2026 TRAINING DATES

### JANUARY

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<a href="#">Faith-based Governance Training</a>	13th January 2026
<a href="#">Understanding Governance: The Trustee Role</a>	15th-16th January 2026
<a href="#">Brand Reputation Training for Charities</a>	20th January 2026
<a href="#">Data Protection Training for Charities</a>	27th January 2026
<a href="#">Finance for Trustees</a>	29th January 2026

### FEBRUARY

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<a href="#">Protecting your Legacy Income</a>	3rd February 2026
<a href="#">Preventing Charity Fraud</a>	5th February 2026
<a href="#">Charities SORP Training: Lease Accounting</a>	10th February 2026
<a href="#">The Art of Being an Effective Chair</a>	12th-13th February 2026
<a href="#">Contract Training for Charities</a>	26th February 2026

### MARCH

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<a href="#">Charities SORP Training: Revenue Recognition</a>	3rd March 2026
<a href="#">Understanding Governance: The Trustee Role</a>	5th-6th March 2026
<a href="#">Reserves Policy Training</a>	12th March 2026
<a href="#">How to Recruit and Retain a Diverse Board</a>	17th March 2026
<a href="#">Data Protection Training for Charities</a>	18th March 2026
<a href="#">Risk Management for Trustees</a>	19th March 2026

### APRIL

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<a href="#">SEO Training for Charities</a>	16th April 2026
<a href="#">Charities SORP Training: Tiering, Reporting, Reserves and Investments</a>	21st April 2026

## 2026 TRAINING DATES

### MAY

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<a href="#">Understanding Governance: The Trustee Role</a>	6th-7th May 2026
<a href="#">Best Practice Reporting</a>	12th May 2026
<a href="#">Get Your Charity Featured in the Media</a>	21st May 2026
<a href="#">Preventing Charity Fraud</a>	28th May 2026

### JUNE

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<a href="#">Understanding Governance: The Trustee Role</a>	3rd-4th June 2026
<a href="#">Data Protection Training for Charities</a>	11th June 2026
<a href="#">Finance for Trustees</a>	25th June 2026

### JULY

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<a href="#">Reserves Policy Training</a>	2nd July 2026
<a href="#">Understanding Governance: The Trustee Role</a>	7th-8th July 2026

### SEPTEMBER

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<a href="#">Understanding Governance: The Trustee Role</a>	8th-9th September 2026
<a href="#">Data Protection Training for Charities</a>	17th September 2026
<a href="#">Contract Training for Charities</a>	22nd September 2026
<a href="#">Risk Management for Trustees</a>	24th September 2026

### OCTOBER

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<a href="#">Preventing Charity Fraud</a>	6th October 2026
<a href="#">Understanding Governance: The Trustee Role</a>	13th-14th October 2026
<a href="#">The Art of Being an Effective Chair</a>	28th-29th October 2026

### NOVEMBER

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<a href="#">Best Practice Reporting</a>	3rd November 2026
<a href="#">Finance for Trustees</a>	12th November 2026
<a href="#">Understanding Governance: The Trustee Role</a>	25th-26th November 2026



## 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](http://civilsociety.co.uk/gandl)

### 2026 DATES

12-13 February  
28-29 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](http://civilsociety.co.uk/cfmag)

## 2026 DATES

12 May

3 November

## TIMES

10AM-1PM

## PRICES

**Charity rate:** £159

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**Corporate subscriber rate:** £300

(prices exclude VAT)

## 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:

Michael Cooper-Davis, partner, Price Bailey

Michael has specialised in the charity sector for over ten years. He has managed the audits of a wide variety of not for profit clients – including theatres and arts organisations, large international charities, national education and membership bodies, sports charities and independent schools.

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.





## BRAND REPUTATION TRAINING FOR CHARITIES

In today's fast-moving digital landscape, a charity's reputation is one of its most valuable assets. Trust, public perception, and the ability to raise funds or deliver services can be significantly impacted by how well a charity manages its brand. From copyright and trade marks to online abuse and data breaches, reputation management is essential. This practical, expert-led training will help you understand the legal and strategic tools needed to safeguard your charity's identity and uphold public trust.

### Discounts available

Subscribers to any Civil Society Media magazines can save **£40**. Find out more about this publication at [civilsociety.co.uk/shop](https://civilsociety.co.uk/shop)

### 2026 DATES

20 January

### TIMES

10AM-1PM

### PRICES

**Charity rate:** £159

**Charity subscriber rate:** £119

**Corporate rate:** £400

**Corporate subscriber rate:** £300

(prices exclude VAT)

## PROGRAMME SUMMARY

### COPYRIGHT

- How is UK copyright law relevant to charities
- Creating and protecting your own copyright
- AI and copyright issues

### TRADEMARKS

- What is a trade mark and why are they important for charities
- Registration considerations
- Trade mark challenges

### REPUTATION MANAGEMENT AND DISPUTES

- Abusive registration of domain names
- Considerations for defamation
- Dealing with harassment
- Data breaches

### COURSE LEADERS:

Sarah Webb, Partner, VWV

Sarah has particular expertise in intellectual property and has decades of experience supporting clients across commercial and IP needs and trading.

Stephanie Pike, Senior Associate, VWV

Steph specialises in trade mark law and advises clients on trade mark applications and strategy, trade mark infringement, enforcement, and licensing.

Rhiannon Nash, Associate, VWV

Rhiannon advises clients on reputation management matters such as problematic online and social media posts, data protection and intellectual property.





## CHARITIES SORP TRAINING SERIES

Are you ready for the changes to the 2026 Charities SORP?

The Charities SORP 2026 contains a number of important updates, including on lease accounting and revenue recognition. It also introduces a three-tier reporting system based on income. In addition, refreshed trustees annual report requirements, with further guidance added on how to report financial reserves and plans about the future.

To help you plan ahead and ensure your charity is ready for these changes, we are running a series of online training courses in partnership with BDO with each session focussing on a key aspect of the changes.

### 2026 DATES

10 February  
3 March  
21 April

### TIMES

10AM-1PM

### PRICES

#### Individual sessions

Charity rate: £235

Charity Finance charity subscriber: £195

#### Full series (10% saving)

Charity rate: £635

Charity Finance charity subscriber: £585

(prices exclude VAT)

## Session details

This three-part online training series will include the following sessions:

Charities SORP Training: Lease Accounting – 10 February 2026

Charities SORP Training: Revenue Recognition – 3 March 2026

Charities SORP Training: Tiering, Reporting, Reserves and Investments – 21 April 2026

## Discounts available

Book sessions separately or **save 10%** by registering for the full series of three sessions at [civilsociety.co.uk/SORPtraining](https://civilsociety.co.uk/SORPtraining)

Subscribers to Charity Finance magazine can save **£40** on the standard rate. Find out more about this publication at [civilsociety.co.uk/cfmag](https://civilsociety.co.uk/cfmag)

**COURSE LEADER:** Fiona Condon, National Head of Charities, BDO

Fiona is an Audit Partner and is passionate about providing high quality external audit to many of the leading charities and social enterprises in the UK. She spent the first decade of her career with a Big 4 firm which gave her a grounding in a wide range of skills and experience. Her experience of the third sector extends across two decades. Fiona has presented at technical seminars, published numerous articles and co-authored books on charity accounting and governance.





# 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.

## Discounts available

Subscribers to **Governance & Leadership** magazine can save **£40**. Find out more about this publication at [civilsociety.co.uk/gandl](http://civilsociety.co.uk/gandl)

## 2026 DATES

26 February

22 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, assess 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.

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### 2026 DATES

27 January  
18 March  
11 June  
17 September

### TIMES

10AM-1:15PM

### PRICES

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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.





## FAITH-BASED GOVERNANCE TRAINING

Good governance is often seen as a burden – but it can be one of a charity’s greatest assets. This faith-friendly course helps senior leaders and trustees understand what good governance really looks like and how to make it work in practice. It explores how to clarify roles, strengthen decision-making, and build confidence around risk. Scenarios and case studies help participants develop skills in practical, relevant ways

### Discounts available

Subscribers to any Civil Society Media magazines can save **£40**. Find out more about this publication at [civilsociety.co.uk/shop](https://civilsociety.co.uk/shop)

### 2026 DATES

13 January

### TIMES

10AM–4PM

### PRICES

**Charity rate:** £235

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**Corporate rate:** £400

**Corporate subscriber rate:** £300

(prices exclude VAT)

## PROGRAMME SUMMARY

### FOUNDATIONS OF GOVERNANCE

- Why does governance matter
- What does good governance look like
- Governance frameworks
- Issues faced by faith-led organisations

### BEHAVIOURS THAT BUILD TRUST

- What are healthy governance behaviours
- How to have more healthy governance behaviours
- Roles and responsibilities and how to clarify them

### RISK AND RESILIENCE

- Why risk matters and what goes wrong
- How risk management can go well
- Policy implications of managing risk

### DECISION-MAKING IN PRACTICE

- Why decision-making matters and what goes wrong
- How to make different kinds of decisions
- How to make better strategic decisions

### COURSE LEADER: Lucy Bushill-Matthews

Lucy is a governance trainer and consultant supporting charities in the UK to lead with clarity, purpose and integrity. She is on the Faculty of Faith Leadership, equipping senior faith leaders across the Abrahamic traditions, and an Associate of Equi, a UK policy think tank drawing on Muslim insight. Lucy is trustee and treasurer of national charity Respect and was previously COO at the National Zakat Foundation.





## 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.

### Discounts available

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### 2026 DATES

29 January

25 June

12 November

### TIMES

10AM-4PM

### PRICES

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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 led 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.





## GET YOUR CHARITY FEATURED IN THE MEDIA

Get your Charity Featured in the Media is a practical workshop for people in marketing and communications roles in charities who want to gain positive media coverage for their cause — even without prior media experience or big budgets. Over the course of the session, you'll learn how to craft and share stories that grab journalists' attention, how to pitch them effectively, and how to turn coverage into long-term impact for your organisation.

### Discounts available

Subscribers to any Civil Society Media magazines can save £40. Find out more at [civilsociety.co.uk/shop](https://civilsociety.co.uk/shop)

### 2026 DATES

21 May

### TIMES

10AM-4PM

### PRICES

Charity rate: £235

Charity subscriber rate: £195

Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

## PROGRAMME SUMMARY

### WHAT THE MEDIA WANTS

- Recognising the difference between organisational priorities and news value
- How journalists decide what to cover
- Writing and sending compelling press releases

### PITCHING IDEAS TO MEDIA

- Building a contacts list of journalists
- Deciding what to pitch and how to pitch it

### TRACKING RESULTS AND REPORTING

- Measuring media reach and impact
- Demonstrating value beyond “column inches”

### WHEN THINGS GO WRONG

- Mitigating the risks of generating bad publicity
- Handling inaccurate coverage or negative press

### PLUS

- Case studies, resources, current trends

### COURSE LEADER: Gina Hollands

Gina Hollands is a CIPR chartered PR professional with over 20 years' industry experience. With a background in senior roles in PR agencies, Gina founded charity specialists Hollands Associates to support organisations through peace time and crises. Her work is driven by creativity and integrity — and a belief that well-told stories can build trust, shift perceptions and drive real change.





## 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

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### 2026 DATES

17 March

### TIMES

10AM-1PM

### PRICES

**Charity rate:** £159

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**Corporate rate:** £400

**Corporate subscriber rate:** £300

(prices exclude VAT)

## 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.





## 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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### 2026 DATES

5 February  
28 May  
6 October

### TIMES

10AM-1PM

### PRICES

**Charity rate:** £159  
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**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.





## PROTECTING YOUR LEGACY INCOME

Managing your charity's legacy income can be a lengthy and complex process. From the various tax considerations (Inheritance, Capital Gains), to dealing with contested legacies and all of the administration in between, there are many factors that can delay legacy income reaching your charity. Led by the legacy protection team at VVW, this course has been designed to give clear and practical legal advice for breaking down these obstacles as well as tools for recognising legacy risks early on in the process.

### Discounts available

Subscribers to any Civil Society Media magazines can save **£40**. Find out more about this publication at [civilsociety.co.uk/shop](https://civilsociety.co.uk/shop)

### 2026 DATES

3 February

### TIMES

10AM-1PM

### PRICES

Charity rate: £159

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Corporate subscriber rate: £300

(prices exclude VAT)

## PROGRAMME SUMMARY

### Realising and maximising legacy income

- Securing the legacy and interpreting the legacy
- Managing early-stage risks
- Internal process (sign-off, policies, insurance and decision-making)
- Tax considerations: Inheritance Tax, Capital Gains Tax & Income Tax
- Maximising final legacy income
- Policing the administration (timescales, communication, transparency)

### Contested legacies

- Removal of personal representatives – what constitutes 'unreasonable'?
- Protection of charities duties in the face of litigation
- Avoiding a contested hearing
- Defending litigation – Inheritance Act claims and validity of Wills

### Charity law considerations

- Ex-gratia requests and Charity Commission applications
- Update on Charities Act 2022 changes
- Re-purposing legacies and Charity Commission engagement

## COURSE LEADERS:



Laura Chesham,  
partner, VVW



Georgina Howe,  
solicitor, VVW



Leila Goodarzi,  
partner, VVW



Michelle Rose,  
partner, VVW

The legacy protection team at VVW has a strong track record of supporting charity and HEI clients with the full spectrum of legacy work: from early-stage reputation management and strategic advisory work, and ongoing legacy management, through to mediation and litigation to defend contested legacies.



## 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](http://civilsociety.co.uk/cfmag)

### 2026 DATES

12 March

2 July

### TIMES

10AM-1:15PM

### PRICES

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**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 FOCUSED APPROACH

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

### HOW TO DEVELOP A SMART RESERVES POLICY

- Take a look at example policies from other charities

### CONCLUSIONS

- How to use your reserves policy at your charity

### 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.





## RISK MANAGEMENT FOR TRUSTEES

In an era of increasing concern regarding liabilities, litigation, regulatory compliance and reputational risk, charities are coming under greater scrutiny than ever. This course is a non-technical introduction to risk management designed to enable trustees to manage risk generally, but with a focus on risks related to governance, employment, assets, service users and third parties. The programme will help you to interact effectively with advisors and regulators, hold your executive to account, improve decision making and govern your risk management activities.

### Discounts available

Subscribers to **Governance & Leadership** magazine can save **£40**. Find out more about this publication at [civilsociety.co.uk/gandl](http://civilsociety.co.uk/gandl)

### 2026 DATES

19 March

24 September

### TIMES

10AM-16:30PM

### PRICES

**Charity rate:** £235

**Charity subscriber rate:** £195

**Corporate rate:** £400

**Corporate subscriber rate:** £300

(prices exclude VAT)

## PROGRAMME SUMMARY

### INTRODUCTION TO RISK AND RISK MANAGEMENT

- What is Risk?
- What is Risk Management?
- The Human Factor
- Why and how things go wrong

### RISK MANAGEMENT FOR CHARITABLE BOARDS

- Defining your Risk Universe
- Defining your Risk Appetite
- Building and Using your Risk Register

### WHY AND HOW THINGS GO RIGHT

### BUILDING RESILIENCE IN YOUR ORGANISATION

### RISK MANAGEMENT FOR CHARITIES AND CHARITABLE TRUSTEES

- Accountability and “Ownership”
- Risks related to Trusteeship
- Governance and Compliance Risks
- Strategic Risk
- Regulatory Risk
- Reputational Risk
- Trustees and Leadership

### COURSE LEADER: Stephen McAndrew

Stephen is an experienced consultant and advisor who works with charities, public services and businesses to understand and manage the risks that they face. He spent 10 years developing risk management and patient safety programmes in the NHS in the UK, and state health and care systems. He has been a trustee of a number of charities where he has successfully applied risk management practices.





## SEO TRAINING FOR CHARITIES

Do you want to boost your organisation's visibility online but you're not sure where to start? This practical, jargon-free course is designed to help you understand how search engines work, how to identify your key users and how to create people-first content that drives traffic. This interactive session will also explore the role of PR and AI in search, and you'll leave with a personalised plan of action to take back to your charity.

### Discounts available

Subscribers to any Civil Society Media magazines can save £40. Find out more at [civilsociety.co.uk/shop](https://civilsociety.co.uk/shop)

### 2026 DATES

16 April

### TIMES

10AM-1PM

### PRICES

**Charity rate:** £159

**Charity subscriber rate:** £119

**Corporate rate:** £400

**Corporate subscriber rate:** £300

(prices exclude VAT)

## PROGRAMME SUMMARY

### SEO FUNDAMENTALS

- A brief history of search
- Creating people-first content
- Identifying key users

### LIVE PAGE REVIEW

- Analyse a live webpage and look for opportunities to improve its visibility

### THE ROLE OF PR IN SEO

- The value of news coverage in SEO
- How you can capitalise on your unique experiences to drive publicity
- Exercise applying this learning to your own organisation

### THE ROLE OF AI/LLMS IN SEO

- Learn how best to tackle this emerging technology head on.

### PRACTICAL SEO TIPS

- The three types of SEO
- Tools to enhance, track, and measure
- Personalised plan of action

### COURSE LEADER: Matt Saunders

Matt Saunders is a digital consultant to charities as well as the co-founder of All Things Equal, an organisation which aims to empower charities to enhance their digital impact. Matt has worked in software and website development for 25 years. He's supported dozens of charities, and loves working with people who have a passion for creating positive change.





# UNDERSTANDING GOVERNANCE: 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.

## Discounts available

Subscribers to *Governance & Leadership* magazine can save **£40**. Find out more about this publication at [civilsociety.co.uk/gandl](http://civilsociety.co.uk/gandl)

## 2026 DATES

15-16 January  
5-6 March • 6-7 May  
3-4 June • 7-8 July  
8-9 September  
13-14 October  
25-26 November

## TIMES

Day 1: 10AM-1PM  
Day 2: 10AM-12:30PM

## PRICES

Charity rate: £235  
Charity subscriber rate: £195  
Corporate rate: £400  
Corporate subscriber rate: £300  
(prices exclude VAT)

## 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.



Susan Daniels OBE

Susan was CEO of the National Deaf Children's Society for 33 years and has chaired many charity boards.



For more information about Civil Society Media training, please visit [civilsociety.co.uk/training](https://civilsociety.co.uk/training) or e-mail [events@civilsociety.co.uk](mailto:events@civilsociety.co.uk)

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