ONLINE TRAINING FOR CHARITY LEADERS

2026 PROGRAMME

CIVILSOCIETY media | GOVERNANCE &LEADERSHIP | CharityFinance | Fundraising magazine

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2026 TRAINING DATES

JANUARY

Faith-based Governance Training	13th January 2026
Understanding Governance: The Trustee Role	15th-16th January 2026
Brand Reputation Training for Charities	20th January 2026
Data Protection Training for Charities	27th January 2026
Finance for Trustees	29th January 2026

FEBRUARY

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

MARCH

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

APRIL

SEO Training for Charities	16th April 2026
Charities SORP Training: Tiering, Reporting, Reserves and Investments	21st April 2026

MAY

Understanding Governance: The Trustee Role	6th-7th May 2026
Best Practice Reporting	12th May 2026

2026 TRAINING DATES

MAY

Get Your Charity Featured in the Media	21st May 2026
Preventing Charity Fraud	28th May 2026

JUNE

Understanding Governance: The Trustee Role	3rd-4th June 2026
Data Protection Training for Charities	11th June 2026
Finance for Trustees	25th June 2026

JULY

Reserves Policy Training	2nd July 2026
Understanding Governance: The Trustee Role	7th-8th July 2026

SEPTEMBER

Understanding Governance: The Trustee Role	8th-9th September 2026
Get Media Interview Ready	15th September 2026
Data Protection Training for Charities	17th September 2026
Contract Training for Charities	22nd September 2026
Risk Management for Trustees	24th September 2026

OCTOBER

Preventing Charity Fraud	6th October 2026
Understanding Governance: The Trustee Role	13th-14th October 2026
The Art of Being an Effective Chair	28th-29th October 2026

NOVEMBER

Best Practice Reporting	3rd November 2026
Social Media Training for Charities	4th & 18th November 2026
Finance for Trustees	12th November 2026
Faith-based Governance Training	17th-18th November 2026
Understanding Governance: The Trustee Role	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

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

2026 DATES

12 May

3 November

TIMES

10AM–1PM

PRICES

Charity rate: £159

Charity subscriber rate: £119

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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

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

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

COURSE LEADER: Fiona Condron, 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

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 LEADER: 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.

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

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

2026 DATES

27 January
18 March
11 June
17 September

TIMES

10AM-1:15PM

PRICES

Charity rate: £159

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Corporate subscriber rate: £300

(prices exclude VAT)

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

2026 DATES

13 January

17-18 November

TIMES

10AM–4PM

PRICES

Charity rate: £235

Charity subscriber rate: £195

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

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

2026 DATES

29 January

25 June

12 November

TIMES

10AM-4PM

PRICES

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Corporate subscriber rate: £300

(prices exclude VAT)

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.

GET MEDIA INTERVIEW READY

Media interviews can be a valuable opportunity to raise awareness of your charity, but they can also feel daunting without the right preparation. This interactive half-day online course is designed to help charity staff develop the confidence and practical skills needed to handle media interviews effectively. By the end of the session, attendees will feel better equipped to represent their organisation with confidence, credibility and impact.

Discounts available

Subscribers to any Civil Society Media magazines can save £40. Find out more at civilsociety.co.uk/shop

2026 DATES

15 September

TIMES

10AM-1PM

PRICES

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Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

PROGRAMME SUMMARY

TYPES OF INTERVIEWS AND HOW THEY DIFFER

- Discussing examples of the good, the bad, and the just plain awkward

GROUP PRACTICE

- Interview techniques to build your confidence and deliver a better interview
- Work with fellow delegates to practice your interview pacing

HOW TO BEST PREPARE FOR AN INTERVIEW

- Who should be interviewed?
- When to accept/decline a media interview

CONSIDERING AUDIENCE AND OPTICS

- How to adjust your interview technique for different interviewers and to portray a certain message

MORE GROUP PRACTICE

- Practice technique as both an interviewee and interviewer
- Reflections on technique practice

CONCLUSIONS AND Q&A

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.

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

2026 DATES

21 May

TIMES

10AM-4PM

PRICES

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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

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

2026 DATES

17 March

TIMES

10AM-1PM

PRICES

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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

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

2026 DATES

5 February

28 May

6 October

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.

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 adminstration in between, there are many factors that can delay legacy income reaching your charity. Led by the legacy protection team at VWV, 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

2026 DATES

3 February

TIMES

10AM-1PM

PRICES

Charity rate: £159

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Corporate rate: £400

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, VWV

Georgina Howe, solicitor, VWV

Leila Goodarzi, partner, VWV

Michelle Rose, partner, VWV

The legacy protection team as VWV 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

2026 DATES

12 March

2 July

TIMES

10AM–1:15PM

PRICES

Charity rate: £159

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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 FOCUSSED 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

2026 DATES

19 March

24 September

TIMES

10AM–16:30PM

PRICES

Charity rate: £235

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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

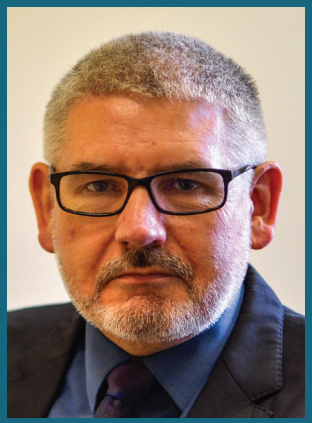
BUILDING RESILIENCE IN YOUR ORGANISATION

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 interative 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

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.

SOCIAL MEDIA TRAINING

Learn how social media platforms work today, how to measure success using meaningful data and turn insights into more effective strategies. Through real-world examples, hands-on exercises and guided analysis of your own channels, you will learn how to set achievable objectives, interpret performance metrics with confidence and identify opportunities to improve engagement and impact. The course will take place over two sessions which are two weeks apart, allowing time for implementation of learning between sessions.

Discounts available

Subscribers to any Civil Society Media magazines can save £40. Find out more at civilsociety.co.uk/shop

2026 DATES

4 & 18 November

TIMES

10AM-1PM

PRICES

Charity rate: £235

Charity subscriber rate: £195

Corporate rate: £400

Corporate subscriber rate: £300

(prices exclude VAT)

PROGRAMME SUMMARY

SESSION 1

INTRODUCTION

- Overview of social media, what has changed in the last few years and examples of charities who are smashing it

WHICH METRICS AND BENCHMARKS MATTER?

- Followers vs Reach vs Impressions (what they actually mean)
- What you should be tracking and how to calculate engagement
- Practical template spreadsheet for measuring performance

Complete spreadsheet exercise between sessions

SESSION 2

- Personalised feedback and recommendations based on spreadsheet exercise
- Setting actionable goals for your future social strategy

COURSE LEADERS:

Athar Abidi, Head Of Social, Cancer Research UK

With over a decade's experience in the charity sector at British Lung Foundation, Age UK, The British Heart Foundation, RNLI and Cancer Research UK, Athar has worked on a huge range of campaigns, social activations and crisis comms challenges.

Charlotte Hopwood

Charlotte is a Communications Project Manager at National Institute for Health and Care Research and a freelancer at Proofpoint, a social media reporting and strategy consultancy. Previously Charlotte was a Social Media Officer at Cancer Research UK.

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

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

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)

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** or e-mail **events@civilsociety.co.uk**

CIVILSOCIETY media GOVERNANCE &LEADERSHIP CharityFinance