TRAINING DATES

The following course dates are subject to change, visit our website for the most up-to-date details.

UNDERSTANDING GOVERNANCE STAGE 1

Takes place over two mornings

11-12 July 2023

1-2 November 2023

27-28 September 2023

UNDERSTANDING GOVERNANCE STAGE 2

Takes place over two mornings

7-8 November 2023

BOARD LEADERSHIP STAGE 2

Takes place over two mornings

28-29 November 2023

THE ART OF BEING AN EFFECTIVE CHAIR

Takes place over two mornings

10-11 October 2023

FINANCE FOR TRUSTEES **One full-day**

21 November 2023

RISK MANAGEMENT **One full-day**

17 October 2023

RESERVES POLICY TRAINING

One half-day (morning)

6 September 2023

INTRODUCTION TO ANTI-RACISM IN CHARITIES **Takes place over two mornings**

19-20 September 2023

SAFEGUARDING TRAINING

One half-day (morning)

26 September 2023

CHARITY EMPLOYMENT LAW: TRAINING FOR A POST-PANDEMIC WORLD

One half-day (morning)

3 October 2023

ADDRESSING FINANCIAL SUSTAINABILITY IN A COST-OF-LIVING CRISIS

One half-day (morning)

14 November 2023

BEST PRACTICE REPORTING

One half-day (morning)

3 October 2023

MEASURING THE IMPACT OF YOUR ORGANISATION

Two half days (mornings)

12-13 September 2023

STAGE 1: THE TRUSTEE ROLE

If you are new to the role of being a charity trustee, this course will provide the perfect introduction, while experienced trustees will also benefit from a refresher of their responsibilities and comprehensive updates on evolving elements of the trustee role. By blending governance and board leadership theory with interactive case studies, the first of our two Understanding Governance courses provides a lively learning environment where you can meet other trustees to share challenges and ideas.

> "Dorothy's knowledge is exceptional and her ability to convey a lot of important information in an engaging way is amazing."
>
> Hayley Lewis, director and owner, HALO Psychology

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Part A

9.55am	Log in to ensure prompt start at 10am
10.00am	Introductions
	The changing environment in which trustees and charities have to operate CC3 – Duties of trustees Including: • collective authority and responsibility of trustees • acting solely in the interests of the charity • not benefiting When trustees can be personally liable Duties of Company Directors
	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
	Lunch
	Information needs of trustees • 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 **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
2.15pm	End

NOTE: There will be a short comfort break at about 11.30am

PART B

You will be provided with a case study to read prior to joining this session.

9.55am	Log in to ensure prompt start at 10am
10.00am	Case study
	Break
	Relationships with your chief executive and chair of trustees • holding the CEO to account without meddling in management; • getting the right balance between support and constructive challenge; • Julia Unwin's 5S model for high performance boards
12.30pm	End

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 our stage 1 course 'Understanding governance and the trustee role', focusing on practical solutions to the challenges you face. This course covers a wide range of key governance issues and aims to help you to improve the overall effectiveness of your board.

> "Informative, interactive and highly stimulating. Great to learn from a real expert!"
>
> Caroline Savage, trustee, Kidney Research UK

Book onto Understanding governance stage 1 and get 30% off stage 2*

*You must be a registered charity and a *Governance & Leadership* subscriber to receive this offer

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Part A

9.55am	Log in to ensure prompt start at 10am
10.00am	Introductions
10.15am	**Brief reminder of the fundamentals of governance** **Refreshing the board – identifying new trustees** • What is your role in identifying potential trustees? • What is good board practice? • Once elected/appointed, ensuring new trustees receive appropriate induction and support
	Break
	Re-join **Board behaviours and dealing with people problems** • Trustees can behave badly too • Spotting the signs of a deteriorating relationship between the CEO and the board • Closed/private meetings/sessions of the board
	Lunch
12.15pm	**Dealing with risk strategically and systematically** • Much of governance is about identifying and managing strategic risk without getting risk averse What role should you as trustee play in dealing strategically and systematically with risk
2.00pm	End

PART B

You will be provided with a case study to read prior to joining this session.

9.55am	Log in to ensure prompt start at 10am
10.00am	Case study
	Break
	Developing a learning organisation – Why reviewing performance is important for every trustee and the board: • Reviewing the CEO's performance; • Reviewing the chair's performance • Reviewing the effectiveness of the board • Reviewing the effectiveness of each board committee • Reviewing the performance of each trustee. • Open session – a chance to raise any other trustee issues
12.30pm	End

STAGE 2: PRACTICAL BOARD SOLUTIONS

Designed to provide chairs and chief executives who are experienced in their role, or have already attended our stage 1 course, with practical board solutions. This course addresses high-level board leadership and behavioural issues, enabling you to develop a high-performing board.

Part A

9.55am	Log in to ensure prompt start at 10am
10.00am	Brief Introductions
10.00am	**Brief reminder of the fundamentals of governance.** **Complexities of conflicts of interest.**
	Board committees • Making sure all committees add value to governance: • Governance structures • Reporting back and reviewing committee effectiveness **Each committee's role in risk identification and risk management.** **CEO remuneration** • Getting it right • Being able to defend the board's remuneration policy **Succession planning** • Planning for predicted as well as unexpected departures of key people including the CEO and chair.
2.00pm	**End**

NOTE: There will be a short 10 minute comfort break at about 11.30am and a 30-minute lunch break at about 12.30pm

PART B

You will be provided with a case study to read prior to joining this session.

9.55am	Log in to ensure prompt start at 10am
10.00am	**Case study**
	Break
	Chair/CEO and CEO/board relationship: • Ensuring the board can hold the CEO to account without meddling in management • Building a successful chair/CEO relationship **Behaviours that can damage the relationship.** **Refreshing the board and finding new trustees** • providing support to and ensuring new trustees become effective as quickly as possible. • Open session - a chance to raise any other governance issues
12.30pm	**End**

> "Very useful and applicable to improving board leadership and therefore the experience of my fellow trustees."
>
> Alasdair Paterson, Chair of Board on Trustees, The Mount Camphill Community

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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. This course will help you to chair well and to ensure that board governs effectively and that board committees add value to the governance process. Scenarios and case studies help develop skills in practical ways.

> So useful to hear this combination of stories and tactics both from Dorothy and from colleagues in the room.

Noelle Rumball, Chair, University of Bristol

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Part A

9.55am	Log in to ensure prompt start at 10am
10.00am	Introductions
	Fundamentals of governance • What every chair of the board or every chair of a committee needs to have a deep understanding of **Role of chair** • The chair's role • Requirements of the role • Characteristics of a good chair • Do's and Don'ts
11.00am	Break
11.10am	**Relationship of chair with trustees** • Keeping board/committee members engaged and interested in governance **Planning:** • Planning the work of the board and committees • Agendas • Preparing for meetings • Basic rules for Board & Committee papers
12.15pm	Lunch
12.45pm	**Planning: Meetings** • Actions before and after meetings **The art of chairing a meeting**
2.00pm	**End**

PART B

You will be provided with a case study to read prior to joining this session.

9.55am	Log in to ensure prompt start at 10am
10.00am	Case study
	Re-join **Getting behaviours right at meetings** **Dealing with conflict including difference between tension and conflict** **Relationship with CEO and staff** • Getting the right balance between support and challenge • Julia Unwin's 5S model for high performance boards/ committees • Meetings without staff
12.30pm	**End**

FINANCE FOR TRUSTEES

This one-day training course will provide you with the knowledge and confidence to monitor and question financial information, and make major decisions jointly with others regarding financial planning and major expenditure for your charity.

10.00am	Introductions and charity sector background
10.15am	**Accounts** • What is a SORP? • What's unusual in charity accounting? • How to understand charity accounts
11.30am	Refreshment break
12.15pm	**Annual reporting – public benefit and reserves** • What should be in annual reports? • Trustees' responsibilities
12.45pm	Lunch break
1.30pm	**Budgets & Financial information for trustees** • Essential elements of a good budget • Importance of setting financial targets, trend analysis, risk assessment etc
2.00pm	**Tax** • A whistle stop tour for trustees of how tax affects charities
2.30pm	**Audit and investments** • The role and responsibilities of the auditor • The board's relationship with the auditor • Types of investments a charity can make
3.00pm	Refreshment break
3.15pm	**Risk and fraud** • What do boards need to do about risk? • Preventing and dealing with fraud
3.45pm	**Q&A**
4.00pm	**End**

> “Excellent course delivered with applicable examples to provide context.”

Kevin Barton,
Association for Project Managers

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RISK MANAGEMENT FOR TRUSTEES

This course is a non-technical introduction to risk and risk management designed to enable trustees to understand and manage risk generally, but with a focus on risks related to governance, employment, assets, service users and third parties. By the end of the day you will be better equipped to interact effectively with professional advisors and regulators, hold your executive to account, improve your own decision making and govern your organisation's risk management activities.

9.30am	• Introductions • Understanding your needs and aspirations
09.45am	Breakout session – what are the challenges and opportunities for your charity related to risk and risk management? What do you need to get out of today?
10.00am	**Annual reporting – public benefit and reserves** • What is risk? • What is risk management? • The Human Factor? • Why and how things go wrong... and right
11.30am	Break
11.45am	**Risk management for charitable boards** • Defining your Risk Universe • Defining your Risk Appetite • Building and using your Risk Register • Risk taking and decision making
13.00pm	Lunch
13.30pm	**Building resilience in your organisation**
14.00pm	Breakout session – what will you do differently with your board after today's session and what challenges will you face in doing it?
14.30pm	Break

14.45pm	**Risk management for charities and charitable trustees**
	• Accountability and "ownership"
	• Risks related to trusteeship
	  • Governance and compliance risks
	  • Strategic risk
	  • Regulatory risk
	  • Reputational risk
	• Charities and risk

15.45pm	Q&A and wrap up
16.00pm	**End**

"A comprehensive and thought-provoking introduction to risk management."

Julia Ammon, trustee,
British Stammering Association

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"This course was full of useful information and a good foundation for future board action."

John Watkins, trustee, CLC International

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RESERVES POLICY TRAINING

Reserves are an integral part of a charity's financial strategy and since the outbreak of the COVID-19 pandemic, many charities are having to rely on their reserves in order to continue operating effectively. This half-day online 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 focussed on financial risk and forms an integral part of the charity's financial strategy.

10.00am	**Introduction** • Why reserves are needed • Charity Commission expectations/definitions • What to disclose • Relationship between reserves and working capital
10.20am	**Developing a compliant reserves policy** • Interactive case study and feedback
11.00am	Break
11.10am	**Common approaches to reserves policies** • A critical appraisal of how many charities approach reserves policies (with real life examples)
11.40am	**An alternative risk focussed approach** • Understanding financial risk • Which risks can reserves be expected to manage and which not
12.10pm	Break
12.20pm	**How to develop a smart reserves policy** • Interactive case study and feedback
13.00pm	**Conclusions** • How to use your reserves policy
13.15pm	**End**

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> "It was great to be put into teams and do some scenario planning, it really helped to gain an understanding of how we might apply the knowledge learned from the course, into our real-life scenarios."

Kristie Effemey, Momentum Children's Charity

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INTRODUCTION TO ANTI-RACISM IN CHARITIES

This course is a perfect introduction for senior leaders and trustees to learn and plan how to work towards race equity in their organisation's culture, practice and services.

Over two mornings, you will learn to:

- Understand key race equity concepts and terminology
- Understand the context and need for this work within our sector
- Assess where your organisation is on its journey towards race equity,
- Explore creating a compelling race equity vision
- Begin to set tangible goals.

The tools used in this programme will be shared so that you can use them with your own boards and teams to engage them in this shared journey towards race equity.

Day 1

9.55am	Log in to ensure prompt start at 10am
10.00am	**Introductions and tech rules** Purpose of the 2 sessions and intro to today Framing: Get comfortable being uncomfortable
10.30am	**Brief intro to definitions: racism, institutional / systemic / structural racism, interpersonal racism, non-racism, anti-racism** What is privilege? What are microaggressions? Where is the sector at? Some stats and quotes from the sector
1.00pm	**End**

NOTE: There will be a short comfort break at about 11.30am

Day 2

9.55am	Log in to ensure prompt start at 10am
10.00am	**Introductions and tech rules** Purpose of the 2 session and intro to today Framing: Get comfortable being uncomfortable
10.30am	**Assessing where your organisation is on its journey towards race equity,** Creating a compelling race equity vision Setting tangible goals. Using these tools with staff or trustee teams Commitment setting
12.30pm	**End**

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> "Pari and Chaka provided some fantastic tools to tackle the difficult subject of race and racism. They provided us with, amongst other things, the language to create a safe space to talk about the subject and many others to manage daily interactions amongst a diverse team."

Nana Raphael, HI UK

SAFEGUARDING TRAINING

This half-day course will provide you with a thorough overview of your charitable safeguarding duty. Over the course of the morning, you will explore how to set an effective safeguarding culture, how the Commission assesses safeguarding compliance and what you can learn from recent movements such as me too, BLM and Everyone's Invited.

9.30am	**Introduction**
9.40am	**Charity safeguarding duty** • What does this mean? • How does the Charity Commission assess safeguarding compliance and what does this mean for your charity • Reporting serious incidents
10.30am	Break
10.45am	**Safeguarding children and adults at risk**
11.05am	**The importance of an effective safeguarding culture** • What is it? • How is it set? • How can/should it be measured?
11.35am	Break
11.45am	**Breakout rooms focused on the continual improvement of safeguarding culture** This should provide attendees with an opportunities to share their current practices and experiences with each other and consolidate key points from the training for practical application.
12.20pm	**Conclusions**
12.30pm	**End**

CHARITY EMPLOYMENT LAW: TRAINING FOR A POST-PANDEMIC WORLD

Since the pandemic many organisations have faced employment challenges including working from home, hybrid working, the furlough scheme and redundancies. This course aims to provide a comprehensive overview of the key employment laws and regulations that charity leaders should comply with in order to manage their employees fairly and effectively.

10.00am	**An introduction to the course and course objectives**
10.15am	**Recruitment and employment contracts** • Statutory obligations and requirement to issue a contract • Safer recruitment and safeguarding
10.35am	**Employment, diversity and inclusion** • Protected characteristics • Wider diversity issues
11.00am	Break
11.15am	**Managing grievance and disciplinary issues** • Overview of fair process • Managing appeals
11.45am	**Making changes to the workforce** • Changing contract terms -how to do it • Working from home and hybrid working • Redundancies - overview of fair process
12.15pm	Break
12.30pm	**Case Update** • The latest updates
13.00pm	**Conclusions**
13.15pm	**End**

ADDRESSING FINANCIAL SUSTAINABILITY IN A COST-OF-LIVING CRISIS

This training session is designed for charity leaders including chief executives, trustees, finance professionals, strategists and those involved in income generation including fundraising. It will be particularly useful for charities and nonprofits who need to improve their financial sustainability by understanding better where costs are allocated and how to implement strategies to meet those costs and deliver benefit for stakeholders. The session will be interactive and discursive. Be prepared to join discussions about how the principles touch on real issues in your charity.

10.00am	**Introduction**
10.05am	**Section 1 – Knowing your costs (acknowledge the gap) and cost recovery (measure the gap)** We will consider how charity business models look to allocate and apportion costs to arrive at a transparent and fair overhead level. Recharging is critical here and we will look at why this is the case. Then we will touch on how examining your future income flows allow you to then measure the cost recovery gap and your charity's structural solvency or lack of it.
11.00am	Break
11.15am	**Section 2 – Financial sustainability of programmes and services (fund the gap)** Once you know the size of your gap, we will look at how to fund / close that gap. Signing-off any subsidy is the single easiest way to help do this, assuming reserves allow this. We will look at other opportunities to close the gap if you don't. Being able to talk transparently and factually about your funding gap is important both internally and externally. It is crucial to closing that gap.
12.15pm	Break
12.30pm	**Section 3 – What about Impact? 2x2 grid of Impact and Financial Sustainability** We can't talk about the money side of programmes without touching on the impact they create. When making decisions about investment or divestment of your charitable activities, you can't base the decision solely on the financials. While we won't cover this in depth, we will outline a helpful decision-making tool to understand your mix of services and programmes, and how the social value they create relates to their financial sustainability.
12.45pm	**Conclusions and Q&A session**

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BEST PRACTICE REPORTING IN THE CHARITY SECTOR

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 course will give the tips on best practice reporting in the sector and show you how to think about your Trustees report differently. It is much more than a compliance document and an opportunity to 'tell your story' in an engaging way.

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10.00am	**Introduction**
10.05am	**Strategy, objectives and 'Telling your story'** What makes a Trustees report interesting, engaging and informative for the reader? How can you look at presenting information in a succinct user friendly way? This session will look at some of the challenges in reporting against the 'measures of success' requirements of the Charities SORP; and give examples and ideas of how to develop a new style of reporting for your charity. The next Charities SORP is likely to make 'impact' reporting a requirement so charities need to think about and prepare for the forthcoming changes ahead.
10.40am	**Risk** A key reporting requirement under the Charities SORP is to list the key risks facing the charity and how these are mitigated. This session will look at disclosure examples of risk statements and also challenge you to think about the risks that are featured in your charity's accounts. Are these the strategic risks? Have they been appropriately summarised and disclosed or is the wording very generic?
11.00am	Break
11.15am	**Optional disclosures and evolving trends** Many charities disclose information over and above the requirements of the Charities SORP. This session will look at new disclosures and evolving trends on areas to consider including in your Trustees report and give examples. Recent examples have included areas such as EDI and staff Best Practice Reporting in the Charity Sector Programme disclosures, fundraising disclosures, ESG and climate change.
11.45am	**Reserves polices** One key aspect of the Trustees report is explaining a charity reserves, designations and free reserves in a way that is complimentary with the strategy. This session will provide some examples of best practice and discuss the key attributions in building a reserves policy narrative for disclosure. It is anticipated that the calculation of free reserves will become a future compulsory disclosure and what will this mean for your charity.
12.15pm	Break
12.30pm	**Breakout session** Breakout sessions into groups to discuss the challenges of best practice reporting. Presenters will be attending sessions to help inform the discussions and questions arising.
12.50pm	**Conclusions and Q&A session**

MEASURING THE IMPACT OF YOUR ORGANISATION

Do you truly know the value of the good work that your charity does? Could you be doing more to demonstrate the impact that your work has to funders, donors and the public at large?

This training course will give attendees the knowledge and tools to be able to begin building an impact measurement framework for their organisation. Theoretical, practical and discussion sessions will ensure that trainees come away with a knowledge of how to apply the concepts of social impact measurement and an understanding of how measuring impact can benefit their organisation. Day 1 will focus on impact measurement methodology with Day 2 providing real examples and an opportunity for personal reflection.

DAY 1

9.30am	Introductions
9.45am	Why measure your impact?
10.05am	**Concepts of an impact measurement framework** • Key terminology and definitions • The impact measurement process
10.45am	Break
11.00am	**Discussions in breakout rooms** • Share your challenges around impact, where you are on your impact measurement journey, and what specific needs are relevant to your organisation • Opportunity to ask questions on information presented
11.20am	Building the impact concepts into an impact measurement framework
12.15pm	Wrap up of morning and final questions

DAY 2

9.30am	Greetings and recap on yesterday
9.45am	Understanding outputs and knowing your causal links
10.15am	Exploring your organisational outcomes – a practical task
10.45am	Break
11.00am	Considering impact – looking at the counterfactual, calculations and impact
11.30am	Discussions/questions on applying the model to organisations
12.00pm	Wrap up

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MEET THE COURSE LEADERS

GOVERNANCE COURSE LEADER

Art of Being an Effective Chair, Board Leadership and Understanding Governance

Dorothy Dalton writes, lectures and trains extensively on charity governance. She has over 30 years of experience of governance and was the editor of *Governance* magazine for over ten years. With a 'first' in mathematics, Dorothy, a former headteacher, was chief executive of ACEVO from 1992 to 2000. From 2000 to 2003 she was a non-executive director of the Inland Revenue. She is currently chair of governors of the Petchey Academy in Hackney.

RISK MANAGEMENT COURSE LEADER

Stephen McAndrew 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 and implementing risk management and patient safety programmes in the NHS in the UK, and state health and care systems in Ireland, New Zealand and Australia. For over twelve years he has served as a trustee of a number of charities where he has successfully applied risk management to improving safety, quality, sustainability and organisational resilience.

BEST PRACTICE REPORTING COURSE LEADER

Helena Wilkinson, Partner and Head of Charities

Helena is a Partner and Head of Charities at Price Bailey, she is a charity specialist having worked with in the sector for over 30 years . She was Vice-Chair of ICAEW Charity Community until December 2019, is a recognised charity expert, writes for national/charity press and regularly presents at events. She has worked on the 'other side of the fence' as 7 years as Finance Director in a charity enabling her to give innovative and pragmatic advice as a result. Her roles within the industry have included financial management, corporate governance and strategic planning. She writes the Top 100 analysis of charity reporting for Charity Finance every year In the Autumn which highlights areas of best practice and common trends.

Don Bawtree heads up BDO's charity unit and has specific responsibility for larger and national clients. His experience spans 20 years of working in the sector, with a particular focus on financial governance. Apart from lecturing, client and committee work, he is chair of the Auditing Practices Board committee and author of the *Sorp Compliance Checklist* and (with Kate Kirkland) Tottel's *Charity Administration*.

Fiona Condron is an experienced auditor who spent the first ten years of her career with a Big Four firm. She now focuses exclusively on Not for Profits as a Partner at BDO.
Fiona has:

- presented at internal technical seminars
- co-authored Tolley's "Charity Administration" and the Charities Industry Accounting and Auditing Guide
- written finance modules for the "Informed Trustee" programme launched this year by STEP.

Fiona is also a Trustee and Treasurer of Compaid, a Kent based disability Charity.

Jill Halford is a Partner at BDO and has over 19 years' experience auditing charities. She specialises in audit and advisory work (especially governance reviews). She has also spent time on secondment into charities, working alongside CEOs, including covering the Finance Director role. Jill led a consultancy review on building a sustainable self-regulatory system for charity fundraising in the UK.
She holds the ICAEW diploma in charity accounting. She is an experienced tutor and runs training courses for charity finance professionals.
Jill is on the HighTide (theatre and performing arts company) Advisory Board. She is the treasurer of the membership body Association of Chief Executives for Voluntary Organisations (ACEVO) and a co-opted member on the Audit Committee of the School for Social Entrepreneurs.

RESERVES POLICY COURSE LEADER

Jonathan Orchard is a partner at Sayer Vincent, specialist advisors to the charity and not-for-profit sector. He combines a board portfolio of audit clients with a particular specialism on the international development sector. Prior to returning to Sayer Vincent in 2013 he worked with many of the leading international NGOs providing internal audit and risk management support. He advises charities on the benefits of improved risk management, internal controls and the value that can be added by internal audit. He has been a trustee for the last 10 years – currently with INTRAC where he is treasurer and chair the finance and audit committee.

FINANCIAL SUSTAINABILITY COURSE LEADERS

Dan Fletcher, Director - Moore Kingston Smith Nonprofit Advisory

Dan Fletcher advises trustees and senior leadership teams of nonprofit organisations on their strategic approach. In particular, his focus is on articulating requests for funding and identifying the best funding audiences. He combines his rich experience as trustee, fundraiser, and adviser to help organisations thrive.

The first half of his career involved working in-house for charities spanning healthcare, homelessness, and international development, including several hospices and an NHS charity. He then ran his own consultancy, Delta Fundraising, which saw him working with national charities NCVO and The King's Fund.

At Moore Kingston Smith, Dan has focused on cultural and health organisations, specialising in seeking high-value low-volume gifts, including capital projects and legacy marketing. He brings to bear his wide-ranging background in strategy, voluntary income generation, communications and governance.

Marcus Lees-Millais, Manager (Finance) – Moore Kingston Smith Nonprofit Advisory

Marcus Lees-Millais provides a range of services from finance function reviews and cost recovery work to financial modelling and finance training. He started his charity journey running and volunteering for Durham University Nightline while still studying for his degree before moving to Guernsey and working for PwC for four years to become an ICAEW chartered accountant after seeing how often financial skills are underdeveloped in charities.

Previously at Bayes Business School's Centre for Charity Effectiveness and then at Moore Kingston Smith, Marcus's financial consultancy services have seen him undertake business model and cost recovery reviews for a diverse range of clients ranging from the European Commission and large INGOs through to small, local charities and everything in between.

EMPLOYMENT LAW COURSE LEADERS

Joanne Oliver, partner, VWV

Jo advises on all areas of employment law in relation to both contentious and non-contentious matters. She supports business, charities and educational institutions in navigating complex employment challenges including TUPE transfers, restructures, workplace disputes, trade union relations, employee exits and employment tribunal claims.

Jo has a genuine enthusiasm for employment law and problem solving. By taking a commercial and pragmatic approach to resolving difficult and often sensitive issues, Jo has a track record of achieving successful outcomes for her clients. She works closely with clients to understand their organisation and objectives before tailoring her advice to meet their specific needs.

Jo is a member of the Employment Lawyers Association and regularly provides training on topical employment and HR issues.

Kathy Halliday, partner, VWV

Kathy has over 20 years' experience as an employment lawyer acting for a wide range of commercial clients and clients within the public sector and third sectors including housing associations, schools and charities. She has particular expertise in managing complex projects, including TUPE advice, large scale redundancies and restructurings; and tribunal litigation, including multi applicant claims and complex discrimination issues.

Kathy enjoys understanding her clients' strategic priorities and approach to HR issues so the advice she provides ensures that these are met. She is known for her ability to deal with complex projects and litigation and the advice she provides is always pragmatic and clear.

Independent legal directories rank Kathy as a leading individual in the West Midlands (Legal 500). Kathy is a member of the Employment Lawyers Association and is the Chair of a local Governing Board at an Academy Trust and a Trustee of a local charity.

ANTI-RACISM COURSE LEADERS

Pari Dhillon is the founder and senior consultant at Social Justice Collective Ltd. Pari works with organisations, teams and individuals to maximise their ability to achieve social justice. She has led strategic transformation programmes, EDI audits, EDI learning programmes, embedded culture change and supported teams to define and become the change they wish to see in the world. Pari is an experienced leadership coach, facilitator and trainer.

Chaka Bachmann is the founder and senior consultant at Impact & Culture Ltd. As an intersectional activist and community focused social researcher, Chaka develops evidence-based tools for cultural change. She is an experienced researcher and facilitator, who has led various research and impact projects from evaluating short-term EDI interventions to conceptualising large-scale mixed methods research projects.

Pari and **Chaka** have worked together to support boards and their teams to create equity, diversity and inclusion internally and through their organisational purpose. Clients include: Charity Governance Code, Diversity Principle; Girl Guiding UK, NCVO, Stonewall, Liberty, Citizens Advice, Young Women's Trust; and the FREA/Equally Ours.

Karl Leathem Director (Impact), Moore Kingston Smith
Karl leads the Impact Measurement team, supporting a broad client-load to understand, articulate and improve their social impact. As an experienced Advanced Social Value Practitioner, Karl has produced a number of impact studies across the breadth of the charity and social value sectors.
Karl has been involved with Social Return on Investment (SROI) from its inception, contributing to the establishment of SROI methodology in the UK and the launch of The SROI Network across some 22 countries and growing. He set up and managed the Assurance Process for Social Value International and has unrivalled experience of impact reporting and verification systems.

Helen Campbell Deputy Director (Impact), Moore Kingston Smith
Helen has worked in the charity sector for eight years. She is accredited as an Advanced Social Value Practitioner, and at Moore Kingston Smith works with clients on impact measurement and management, as well as presenting at conferences, webinars and training sessions.
Previously, as the Communications and Membership Coordinator for Social Value UK, Helen organised sector-leading events in impact measurement, and led on communications to raise the agenda of social value and improve quality and consistency of impact measurement. Helen has also worked as Campaigns Officer for FRC Group, a Liverpool based social enterprise, and blends competency of the technical side of impact measurement with an understanding and familiarity with operations and activities within charities.

Penny Court Senior Associate (Impact), Moore Kingston Smith
Penny is an accredited Associate Social Value Practitioner and is currently working towards becoming an Advanced Practitioner in the field. As Senior Associate of Impact at Moore Kingston Smith, she plays a key role in the planning, coordinating and conducting of impact measurement research projects. She presents at webinars, runs training sessions on impact methodology and is involved in the business development and communications side of things.
Penny has been involved in the charity sector for over 15 years in various capacities across the globe. She has lived and worked in the UK, Malaysia, Malawi and South Africa, and has led fundraising programmes and community projects in all of these countries. Penny has been a trustee and board member of a UK and South African not for profit and was chair of the Marlborough College Malaysia Charity Committee between 2012 and 2015. In 2017 Penny set up Channeling Change in Cape Town, South Africa, managing both individual and corporate giving projects.

SAFEGUARDING COURSE LEADERS

Kate Sherlock is a Solicitor the Charities team at VWV. Kate advises charities on a wide range of charity, company and trust law matters. Kate has experience of advising charities on safeguarding governance, including preparing bespoke safeguarding policies and considering appropriate reporting structures. Kate also assists and advises charity's on general governance issues, including the duties and responsibilities of trustees as well as advising charities on reporting serious incidents to the Charity Commission.

Tabitha Cave heads the Regulatory Compliance team at VWV. She is a commercial litigator by background and provides expert advice and counsel on regulatory issues and resulting disputes, including critical incident management, risk, PR and reputation protection and insurance. She has a particular specialism in safeguarding and safeguarding governance and has advised many clients in the management of historic abuse cases. This work includes advice on investigations and inquiries and in particular on the Independent Inquiry into Child Sex Abuse. She project manages teams of cross disciplinary sector specialists, focused on supporting and guiding charities through complex, sensitive, and often high profile cases. She seeks solutions for clients that avoid protracted and costly litigation, priding herself on her straightforward and commercial approach to regulatory issues and the resolution of disputes.

PRICES

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