



# Charity Finance **WEEK**

7-11 OCTOBER 2019

# Charity Finance Week 2019

## 7-11 October

### RETURNING IN 2019

A dedicated week of events celebrating excellence in charity finance

Organised by:

 CIVIL SOCIETY  
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# Charity Finance Week 2019

## 7-11 October



**MATT NOLAN**  
CEO, Civil Society Media




**GARETH JONES**  
Editor, Charity Finance

In October 2019 we will be celebrating excellence in charity finance practice through a dedicated week of events, content and thought leadership initiatives. Starting with a reception at the Houses of Parliament and culminating in the Charity Finance Summit, we will be working with charities, academic institutions and key professional service providers to debate and tackle the biggest issues head-on.

Charity Finance Week is an opportunity to focus on the challenges charities face, showcase their successes and consider their impact. It will draw on the exemplars of best practice and innovation across the sector, whether they be in terms of financial governance, executive leadership or strong operating models.

## TIMETABLE OF EVENTS

<b>MONDAY</b> <b>Parliamentary drinks reception</b>	<b>MONDAY</b> <b>New world disorder?</b>	<b>TUESDAY</b> <b>IT for finance directors</b>	<b>TUESDAY</b> <b>Public trust in charities and the role of charity leaders</b>
<b>WEDNESDAY</b> <b>Fund reporting from your finance system</b>	<b>WEDNESDAY</b> <b>Developing a strategy for financial sustainability</b>	<b>THURSDAY</b> 	<b>FRIDAY</b> <b>Editorial round-up on <a href="http://civilsociety.co.uk">civilsociety.co.uk</a></b>

# PARLIAMENTARY DRINKS RECEPTION

CHOLMONDELEY ROOM, HOUSE OF LORDS  
MONDAY 7 OCTOBER 2019

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This reception in the House of Lords will launch our wide-ranging programme of events for Charity Finance Week with a celebration of the vital role played by financial leaders in the sector.

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The parliamentary drinks reception will be attended by an audience of up to 200 senior figures, including finance directors and treasurers of major charities, thought leaders in the field of charity accounting and investment, major funders and parliamentarians with an interest in the sector.

The event will provide an opportunity to celebrate the contribution of the finance function in a successful charity, as well as other core functions such as HR, property and IT. This year we will be putting a special focus on the annual report and accounts, discussing whether they are fit for purpose and whether they should be more focused around public benefit. The event will primarily be a networking reception, where you'll have the chance to chat informally with key figures in the charity finance sector.

Places at this event are strictly limited and by invite only. To register your interest:



**ONLINE:**

[civilsociety.co.uk/parliamentarydrinks](http://civilsociety.co.uk/parliamentarydrinks)



**CALL US:**

020 7819 1200



**EMAIL:**

[events@civilsociety.co.uk](mailto:events@civilsociety.co.uk)



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# IT FOR FINANCE DIRECTORS: ARE CHARITIES INVESTING SUFFICIENTLY FOR DIGITAL MATURITY?

CENTRAL LONDON • TUESDAY 8TH OCTOBER 2019

This timely, half-day seminar will provide an outstanding opportunity to hear practical tips on how to drive digital transformation within budget. Speakers will explore how data can be used effectively to spearhead change and facilitate accountability. The significance of engaging stakeholders from every level throughout the process will also be addressed.

09:00	Morning coffee and networking
09:25	<b>Welcome address - Chair: Tania Mason</b> , editor, Governance & Leadership
09:30	<b>Transformation in practice</b> Ongoing digital transformation and digital maturity are pivotal in providing accountability throughout charitable organisations. This session will demonstrate practical aspects of transformation that enable greater insights through sophisticated uses of data and technology to spearhead internal change. <b>Ian Williamson</b> , better projects lead, Science Museum
10:00	<b>Understanding the role technology plays in driving accountability</b> Examining the role of digital maturity and leadership in driving accountability and accelerating change. In this session, Nathan will share insight and practical tips through case studies on how to drive digital transformation within your charity and use data effectively to facilitate change and develop a digitally mature and open culture at all levels of the organisation. <b>Nathan Baranowski</b> , founder and director, OJO Solutions
10:30	Networking and refreshment break
10:55	<b>Transforming your organisational culture</b> In this session Martin will discuss how to deliver digital transformation to create an efficient and effective organisation. It's pivotal to ensure that decision-makers and stakeholders are engaged with and invested in the process of digital transformation. Martin will also demonstrate how an organisation's culture is key to decision-making, prioritising, budgeting and implementing an effective digital transformation. <b>Martin Francis Campbell</b> , chief information officer, World Vision
11:25	<b>Q&amp;A with speakers</b>
11:50	<b>Chair's closing remarks</b>
12:00	Session close

TO REGISTER VISIT [CIVILSOCIETY.CO.UK/ITFORFDS](http://CIVILSOCIETY.CO.UK/ITFORFDS)

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# DEVELOPING A STRATEGY FOR FINANCIAL SUSTAINABILITY

CENTRAL LONDON • WEDNESDAY 9TH OCTOBER 2019

This must-attend event will explore how to achieve a coherent and sustainable finance strategy. Attendees at the seminar will learn about best practice in optimising spending, diversifying income streams and creating a culture of financial literacy. Don't miss this unique opportunity to hear from leading professionals in finance strategy.

09:00	Morning coffee and networking
09:25	<b>Welcome address - Chair: David Locke</b> , finance director, Berkshire Schools Trust
09:30	<b>Increasing financial literacy - why it's an essential part of financial strategy</b> <p>With more public focus on financial sustainability in charities, and an increasing recognition that finance is a part of every charity leader's toolkit, good financial literacy is a key element of creating positive change. In this session, Simon Hopkins will explore the relevance of wider financial literacy to creating and delivering a coherent financial strategy. Simon will draw on 35 years' worth of professional experience from sectors as diverse as financial services to central government. He will share his thoughts on how the finance professional can cultivate financial literacy amongst their colleagues and why long-term financial plans are more likely to succeed as a result.</p> <p><b>Simon Hopkins</b>, director, finance, resources and operations, Woldingham School</p>
10:00	<b>Save more, spend more, do more</b> <p>How can charities make their investment strategy more effective? Firstly, they can save more by reducing the fees that they are charged by investment managers. And secondly, by taking risk and return into account, charities will be able to optimise their spending and make more money available to carry out their objectives.</p> <p><b>Pradeep Kachhala</b>, regional director, Institutional Group, SEI; <b>Alistair Jones</b>, UK advice director, Institutional Advisory, SEI</p>
10:30	Networking and refreshment break
10:55	<b>Case study</b> <p>In this session, Sharon will share her experiences of how Cats Protection has evolved its approach to strategic financial planning. This will include how the charity is working towards better integration of business and financial planning, the steps it has taken to diversify its income streams and the related impact on other strategies such as investments and reserves. The session will also consider the challenges that have arisen and how these have been approached.</p> <p><b>Sharon Martin</b>, head of finance, Cats Protection</p>
11:25	<b>Q&amp;A with speakers</b>
11:50	<b>Chair's closing remarks</b>
12:00	Session close

TO REGISTER VISIT [CIVILSOCIETY.CO.UK/FINANCESTRATEGY](http://CIVILSOCIETY.CO.UK/FINANCESTRATEGY)

# CHARITY FINANCE SUMMIT

## LEADING FROM FINANCE



155 BISHOPSGATE, LONDON • THURSDAY 10 OCTOBER 2019

Incorporating the **Charity VAT & Tax**, **Strategy & Risk** and **Investment** conference streams, the Charity Finance Summit has grown to become the key learning and networking event for charity finance teams in the autumn conference season. Together they bring an instructive mix of technical and legal updates, expert advice and guidance, and sharing of best practice.

The Charity Finance Summit has sold out for the past three years, so don't delay in booking places for yourself and your team. We really hope you will join us for what promises to be an excellent day of learning, problem-solving and that all-important networking.

### SESSIONS INCLUDE:

VAT & Tax (2 streams)	Risk & Strategy	Investment
<ul style="list-style-type: none"><li>• Case law overview and recent developments</li><li>• Using certificates to qualify for VAT relief</li><li>• Making Tax Digital: Update from HMRC</li><li>• Gift Aid surgery</li><li>• VAT – Are you in business and how does this affect the reverse charge?</li></ul>	<ul style="list-style-type: none"><li>• Risk appetite in a non-profit – it's not about the money</li><li>• Charities and disputes</li><li>• Financial reserves</li><li>• Are annual reports an effective communication tool?</li><li>• Implementing effective change management</li></ul>	<ul style="list-style-type: none"><li>• A practical guide to CC14, the Charity Commission's guidance on investment matters for trustees</li><li>• Opportunities and risks in the real estate sector</li><li>• Managing investments through a transition</li><li>• The physics of investing</li></ul>

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**FOR THE FULL PROGRAMME**  
**VISIT CIVILSOCIETY.CO.UK/SUMMIT2019**

# OTHER EVENTS HAPPENING IN ASSOCIATION WITH CHARITY FINANCE WEEK

## NEW WORLD DISORDER? THE WORLD IS CHANGING FAST - MIGHT HISTORY REVEAL THE FUTURE?



80 VICTORIA STREET, LONDON • MONDAY 7TH OCTOBER 2019

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The peace and prosperity of the post-Cold War era has been kind to investors. The multi-trillion dollar question is: 'what happens next?'. Big shifts in politics and the global economy suggest major change is afoot, and not necessarily to investors' advantage. We will give a high-level overview of the trends which have shaped the world as we know it, and the changes that we think could be significant.

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## PUBLIC TRUST IN CHARITIES AND THE ROLE OF CHARITY LEADERS



24 KING WILLIAM STREET, LONDON • TUESDAY 8TH OCTOBER 2019

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Join us to explore practical steps you can take to deliver best practice, including:

- Safeguarding and serious incident reporting • New perspectives on good governance
  - Applying the Charity Code of Ethics • Organisational culture, individual attitudes and behaviour change
  - Managing conflicts of interest / loyalty • Relationships with non-charitable organisations
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## FUND REPORTING FROM YOUR FINANCE SYSTEM



CENTRAL LONDON • WEDNESDAY 9TH OCTOBER 2019

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Many charity finance professionals share a common problem: the ability to produce fund reports without resorting to the cumbersome task of manually analysing transactions offline in a spreadsheet. This breakfast seminar explores how finance systems can be configured to generate the reports required by the Charities SORP. Optimise your year-end processes and provide better insight to your organisation by making your finance system work for you.

**TO REGISTER VISIT [CIVILSOCIETY.CO.UK/CFWEEK2019](http://CIVILSOCIETY.CO.UK/CFWEEK2019)**

# EASY WAYS TO BOOK

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2. **Fax** this form to 020 7819 1210
3. **Online** at [civilsociety.co.uk/CFWeek2019](http://civilsociety.co.uk/CFWeek2019)
4. **Phone** 020 7819 1200
5. **Email** [events@civilsociety.co.uk](mailto:events@civilsociety.co.uk)

Event	Price (exc VAT)	No. of delegates	Total
Parliamentary drinks reception	£0		£
IT for Finance Directors	£0		£
Developing a strategy for financial sustainability	£0		£
Early-bird Charity Finance Summit charity place (booking must be made before 6 Sept)*	£269		£

All bookings are subject to Civil Society Media's approval.

\*For corporate rates and post early-bird bookings please visit the website [civilsociety.co.uk/summit2019](http://civilsociety.co.uk/summit2019)

## Opt in to hear from our Charity Finance Week sponsors

Please tick the box above if you are happy for us to pass on the contact details you use to register for the event.

<p><b>1. Delegate details</b></p> <p>Full name:</p> <p>Role:</p> <p>Email:</p> <p>Organisation:</p> <p>Address:</p> <p>Postcode:</p> <p>Tel:</p> <p>Please give details of any access or dietary requirements:</p>	<p><b>2. Booking contact</b></p> <p>Full name:</p> <p>Email:</p> <p><b>3 easy ways to pay</b></p> <p><input type="checkbox"/> Request invoice &amp; pay later</p> <p><input type="checkbox"/> Cheque made payable to: <b>Civil Society Media Ltd</b></p> <p><input type="checkbox"/> BACS Account Name: <b>Civil Society Media Ltd</b> Account Number: <b>17643665</b> Sort Code: <b>23-05-80</b></p>
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