DISCOUNTS FOR
**GOVERNANCE
& LEADERSHIP** AND
CHARITY FINANCE
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GOVERNANCE
&**LEADERSHIP**

ONLINE TRAINING COURSES

AUTUMN 2021 – SPRING 2022

- Understanding Governance-Stage 1 and 2
- Board Leadership-Stage 1 and 2
- Risk Management for Trustees
- Finance for Trustees
- Introduction to Anti-Racism in Charities
- The Art of Being an Effective Chair

- Digital Training for Good Governance
- Measuring the Impact of your Organisation
- Reserves Policy Training
- Safeguarding Training
- Charity Employment Law: Training for a Post-Pandemic World
- Data Protection Training for Charities

BOOK TODAY

EVENTS@CIVILSOCIETY.CO.UK • WWW.CIVILSOCIETY.CO.UK/TRAINING

TRAINING DATES The following courses are currently scheduled to take place online

UNDERSTANDING GOVERNANCE STAGE 1
Takes place over two mornings

9-10 September 2021   20-21 January 2022

9-10 November 2021   2-3 January 2022

UNDERSTANDING GOVERNANCE STAGE 2
Takes place over two mornings

11-12 November 2021

BOARD LEADERSHIP STAGE 1
Takes place over two mornings

18-19 November 2021   9-10 March 2022

BOARD LEADERSHIP STAGE 2
Takes place over two mornings

2nd-3rd December 2021

THE ART OF BEING AN EFFECTIVE CHAIR
Takes place over two mornings

14-15 October 2021   23-24 February 2022

FINANCE FOR TRUSTEES **One full-day**
21 October 2021   28 April 2022

RISK MANAGEMENT **One full-day**
25 November 2021   10 February 2022

RESERVES POLICY TRAINING
One half-day (morning)

16 November 2021   29 March 2022

19 January 2022

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

26-27 January 2022   13-14 October 2021

23-24 March 2022

SAFEGUARDING TRAINING
One half-day (morning)

16 February 2022

MEASURING THE IMPACT OF YOUR ORGANISATION **Takes place over two mornings**

14-15 September 2021

CHARITY EMPLOYMENT LAW: TRAINING FOR A POST-PANDEMIC WORLD
One half-day (afternoon)

8 February 2022   27 September 2022

DIGITAL TRAINING FOR GOODGOVERNANCE
28 October 2021

DATA PROTECTION TRAINING FOR CHARITIES **One half-day (morning)**
25 January 2022

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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

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**

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**

" 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

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BOARD LEADERSHIP

STAGE 1:
HIGH-PERFORMANCE BOARDS

Taking place over two mornings, this course is for new and experienced chairs and chief executives (ideally attending together). The course is designed to help you in your role of building a high-performance board, delivering valuable insights into the key areas of responsibility for chairs and CEOs and providing you with ideas to keep your board moving forward.

> **" Great vibe, perfect pace. Nice to recap the basics but I also learnt so much throughout the day! "**
>
> Amy Martin, CEO/Chair,
> Queen Ethelburga's Collegiate

Book onto Board leadership stage 1 and get 30% off stage 2*

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

Part A

9.55am	Log in to ensure prompt start at 10am
10.15am	**Brief Introductions** **The changing environment in which trustees and charities have to operate** **Ensuring a deep understanding by Chair and CEO of the fundamentals of governance.** **Role and expectations of chairs** • the chair's leadership role • what the chair cannot do - limitations on the chair's role • respecting the collective authority and responsibility of trustees **Ensuring boards fulfil their governance role:** • Trustees' role and the chair's and CEO's relationship with trustees • Success and failure of organisations - the link with governance • Two different models of governance and what each has to offer. **The three key strands of governance: corporate/fiduciary; strategic and impact.**
	Making informed decisions: • Ensuring the board gets the information it needs for good governance. • When too much detail is dangerous – when detail could be important • What should be in a CEO's report to the board • What constitutes a good proposal to the board • Basic rules for board papers • The chair's and CEO's role in quality controlling board papers **Making sure your board is addressing the right issues** • Why well-crafted agendas are so important. • Why planning is vital to help boards fulfil their duties and responsibilities, and stick to their governance role
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
	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**

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

DIGITAL TRAINING FOR GOOD GOVERNANCE

Digital and the COVID-19 crisis is changing the way charities fundraise, deliver services and communicate, and creates new opportunities and challenges for trustees. Taking place over two mornings, this course is packed with insights to help you understand which digital trends are most critical for good governance, how to manage risk, and what every charity board should be doing to delegate digital effectively during the pandemic. Everything you learn will help your charity improve sustainability now and post pandemic.

Day 1

9.30am	Introductions and icebreaker- biggest digital decision your board has faced during the crisis
9.50am	**What does digital really mean and what does it encompass?** • What happens if we don't adapt? (key stats) • What is digital governance? Tips for effective virtual board meetings • Assess where your charity is at with digital (exercise)
10.50am	Coffee
	Where are charities at with digital? Key stats and trends • Case studies and discussion • Exercise- 5 minute quiz to check what you've learned! • Action plan: apply what you've learned today by creating a digital action plan for your board • Scene setting for workshop 2 • Plenary and close
12.30pm	**Close**

Day 2

9.30am	Icebreaker
9.50am	**Resourcing and decision making** • How to make the right decisions about investment • Finding digitally skilled trustees and executive staff • Where can charities get funding for digital transformation? • Other means of funding • Discussion and checkin- what have you learned? • Add ideas to board action plan
10.20am	**Managing digital risk** • Case studies of where digital has gone wrong for charities and what board can learn from them • Topical examples • How to avoid pitfalls • Managing data, reputation, challenges, and how to anticipate risk • Discussion and checkin- what have you learned? • Add ideas to board action plan
11.10am	Coffee
11.20am	**Digital governance toolkit** • Asking the right questions • How to tackle digital at board meetings • Delegation and reporting • Scenario planning • Policies • Cybersecurity • Discussion and exercises • Planning for the future and key trends
12.00pm	**Exercise: finishing your digital action plan for your board and group discussion**
12.25pm	• Sharing useful resources • Plenary and close
12.30pm	**Session closes**

> " A jam-packed, all things digital course. Have taken away many actions – very enjoyable and informative, particularly the delegate/course leader experiences. "
>
> Helen Elliot, CEO, Herts Young Homeless

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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.

Time	Session
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**

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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

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

UNDERSTANDING GOVERNANCE

STAGE 2: GOVERNANCE IN PRACTICE

Designed for experienced trustees, secure in their knowledge of the governance processes and what being a trustee entails, 'Governance in practice' builds on the expertise gained from 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*

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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

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.

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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

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.

Time	Session
9.00am	**Introduction** • Why reserves are needed • Charity Commission expectations/definitions • What to disclose • Relationship between reserves and working capital
9.20am	• Developing a compliant reserves policy • Interactive case study and feedback
10.00am	Break
10.20am	**Common approaches to reserves policies** • A critical appraisal of how many charities approach reserves policies (with real life examples)
10.50am	**An alternative risk focussed approach** • Understanding financial risk • Which risks can reserves be expected to manage and which not
11.20am	Break
11.40am	**How to develop a smart reserves policy** • Interactive case study and feedback
12.20pm	**Conclusions** • How to use your reserves policy
12.35pm	**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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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.

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9.30am	**Introduction** • What is your charitable safeguarding duty?
10.00am	• How the Commission assesses safeguarding compliance and what that means for your charity • Reporting serious incidents
10.30am	Break
10.50am	**Setting an effective safeguarding culture** • What is an organisational safeguarding culture? • Measuring safeguarding culture and the trustees role in setting it
11.20am	**What can we learn from recent movements?** • Black Lives Matter • Everyone's invited
11.50am	Break
12.10pm	**Breakout rooms focussed on how to set an effective safeguarding culture**
12.40pm	**Feedback from breakout rooms**
13.10pm	**Conclusions**
13.15pm	**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.

Time	Session
14.00pm	**An introduction to the course and course objectives**
14.15pm	**Recruitment and employment contracts** • Statutory obligations and requirement to issue a contract • Safer recruitment and safeguarding
14.35pm	**Employment, diversity and inclusion** • Protected characteristics • Wider diversity issues
15.00pm	Break
15.15pm	**Managing grievance and disciplinary issues** • Overview of fair process • Managing appeals
15.45pm	**Making changes to the workforce** • Changing contract terms -how to do it • Working from home and hybrid working • Redundancies - overview of fair process
16.15pm	Break
16.30pm	**Case Update** • Protecting your organisation against discrimination claims • Dealing with COVID-19 related issues
17.00pm	**Conclusions**
17.15pm	**End**

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 and measures you should have in place. You will also learn how to avoid some common data protection pitfalls.

9.30am	**Introduction**
9.45am	**Data protection compliance overview** • What does a compliant charity look like? • What are the key aspects to ensuring continued compliance?
9.45am	**Policies and documents** • What do you need – what documentation is required under the UK GDPR? • What are "nice to haves" – other documents, policies and procedures that are not specifically required, but will assist with demonstrating compliance
10.45am	Break
11.00am	**Contracts and data sharing** • What types of data sharing exist? • What are the rules - when is a data sharing a legal requirement? • What is best practice when it comes to data sharing? • What are the risks of not having agreements in place?
11.30am	**Individual rights: Subject access, rectification, erasure, portability, restriction, objection** • Pitfalls and saviours – where are the risks and how can you mitigate these? • What not to do – common mistakes and the consequences of these • What to make sure you are doing - what to put in place to make dealing with individual rights easier on the organisation
12.00pm	Break
12.15pm	**Fundraising and opting in and out** • What are the rules? • What does the future look like? Are the rules likely to change?
12.45pm	**Conclusions**

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.

DIGITAL COURSE LEADER

Zoe Amar is widely regarded as one of the charity sector's leading digital experts. She founded digital agency and social enterprise Zoe Amar Digital in 2013. Their clients have included NSPCC, Anglia Ruskin University and The School for Social Entrepreneurs. Zoe is Chair of The Charity Digital Code of Practice. Zoe and her team produce an annual barometer of how charities across the UK are using digital, The Charity Digital Skills Report. She also co-authored The Charity Commission's digital guidance for trustees, 'Making Digital Work' and co-founded the Social CEO awards. Zoe has ten years' experience as a charity trustee. She currently sits on the board of Tech Trust. She also sits on the Board Audit and Risk Sub-Committee at the Samaritans as their digital expert. Previously, Zoe worked for 5 years as part of the leadership team at a national charity which advised non-profits about technology. She recently won an Inspiring Communicator award from Charitycomms.

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.

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FINANCE COURSE LEADERS

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.

MEASURING THE IMPACT OF YOUR ORGANISATION COURSE LEADERS

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.

DATA PROTECTION COURSE LEADER

Vicki Bowles, Data Protection Partner (Barrister at Law)

Vicki has extensive experience in advising schools, charities, businesses and public authorities on data protection and freedom of information. Her knowledge of the information commissioner and information tribunal mean that she is able to advice both strategically as well as practically, and she can help with general compliance (such as policies and agreements) as well as specific questions around subject access and other individual rights. Vicki has spoken to a wide variety of audiences on data protection, including faith organisations, schools, charities and creative businesses.

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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.

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.

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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.

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