

# The Charity Accountants' Conference

21-22 September 2017  
Crowne Plaza Hotel, Nottingham

26<sup>TH</sup>  
YEAR

Media Partner:

**Third Sector**

The UK's largest residential conference  
for charity finance professionals

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[www.dsc.org.uk/cac2017](http://www.dsc.org.uk/cac2017)

# The Charity Accountants' Conference 2017

**If you are a charity finance professional, the Charity Accountants' Conference is an event that's not to be missed. This residential conference has everything you need to do the best job, so that your charity can keep making leaps forward for your cause.**

We've put together a packed schedule of sessions to reflect the latest goings-on in the charity finance world, as well as covering the staples of charity finance such as VAT, Gift Aid and risk management.

Over the two days, you will also explore how the law and governance affects finance, the role finance plays in the wider third sector landscape and grow your leadership and working style.

## **Opening plenary Day one 10.15-11.00**

Role of finance staff in meeting the challenges of the charity sector



**Vicky Browning**  
CEO of ACEVO

Vicky Browning was appointed CEO of ACEVO in January 2017 after seven years as Director of CharityComms. Vicky will share her perspective on the state of the charity sector and its future challenges. She will focus on the role treasurers, finance directors and finance teams can play in supporting trustee boards and senior management.

## **Keynote speech**

### **Day two 13.45-14.30**

The view from the Charity Commission



**Nigel Davies**  
Head of Accountancy Services  
Charity Commission

Nigel Davies is Head of Accountancy Services at the Charity Commission. You will have the opportunity to ask Nigel questions on all aspects of charity finance and regulation, including the latest Commission guidance on reserves and fundraising as well as the future development of SORP.



# Day one

8.30 -10.00 Registration

09.00- 10.00 Expert advice surgeries - optional individual 15 minute drop in sessions



**Sayer Vincent**  
Gives expert advice on tax, accounting, governance & risk



**Veale Wasbrough Vizards** are solicitors specialising in Charity Law. On day one they will discuss employment and commercial law issues.

10.15-11.00 Welcome and opening plenary

Role of finance staff in meeting the challenges of the charity sector

Vicky Browning, CEO of ACEVO

	Tax	Legal & governance	Strategic financial management	Personal development
11.15-12.45	<p><b>VAT update</b> VAT for charities is always a complex area. Get your annual update from Sayer Vincent covering changes to the law and new cases impacting the charity sector.</p>	<p><b>Employment law update</b> Regulatory demands on employers continue to increase. This session provides an update on what you need to know to keep abreast of the latest changes to employment law.</p>	<p><b>Fundraising regulation</b> This is the big issue in the charity sector at the moment and it's not just an issue for fundraisers. This session will look at what finance staff and trustees should be aware of in the new fundraising regulations.</p>	<p><b>How to win friends and influence people</b> This session looks at ways to build rapport, adjust communication styles and get your message across. It will lend itself to a variety of situations such as explaining numbers to non-finance people and influencing boards or teams with whom communication can be difficult.</p>
12.45 - 14.00	Lunch			
14.00 - 15.30	<p><b>Gift Aid update</b> Key changes are being implemented now - find out more about the small donations scheme, new rules for valuing benefits and how Gift Aid may apply to membership. Also update on Gift Aid audits and what to expect.</p>	<p><b>Intellectual property - protect your charity assets</b> For many charities their most valuable assets are their intangible assets. This session will cover trade marks, copyright and other means of protecting your intellectual property rights.</p>	<p><b>Culture - the role of finance</b> How can a finance team help define and achieve an organisation's culture? This session will consider what organisational culture is, the hard and soft controls that contribute to culture and how finance can best influence these.</p>	<p><b>Recruiting the right team members</b> Getting the right person for the job is just as important as getting the right skills. This session looks at ways to approach job advertising, the selection process, and the all-important interview questions so you can build up a great finance team.</p>
15.30 - 16.00	Break			
16.00 - 17.30	<p><b>Trading and social enterprise</b> Earning income may be possible within your charity, but check the tax rules on trading and consider whether you need a separate company for your social enterprise activities. Consider how VAT and direct tax interact, plus important tax reliefs such as business rate relief.</p>	<p><b>Data protection</b> Charities have been in the spotlight of data protection compliance. What should charities know to prepare for the introduction of GDPR (in May 2018) and the new fundraising regulations.</p>	<p><b>Managing financial problems</b> Led by insolvency specialists, this session will look at financial warning signs and the actions that charities should take in time of financial distress.</p>	<p><b>Delegating effectively</b> Quite often we shy away from delegation, or don't go about it in the right way. This session will look at the 7 levels of delegation, allowing you to strike the right balance so you feel 'in control' and your team members stay motivated.</p>

17.30-18.30 Expert advice surgeries repeated (see above)

19.30 Dinner

21.00 After dinner entertainment



# Day two

8.30 – 9.30

Expert advice surgeries - optional individual 15 minute drop in sessions



**Sayer Vincent**

Gives expert advice on tax, accounting, governance & risk



**Veale Wasbrough Vizards** are solicitors specialising in Charity Law. On day two they will discuss Charity Law queries.

	Risk	Legal & governance	Strategic financial management	Personal development
9.30 – 11.00	<p><b>Re-thinking risk</b></p> <p>Sayer Vincent published a new guide to managing risk last year to encourage better practice in risk management and move away from a tick box approach. This session will give you practical tips for smartening your risk management processes.</p>	<p><b>Code of good governance</b></p> <p>Launched earlier this year, this session will cover what you need to know to adopt the code including examples of what other charities are doing.</p>	<p><b>Financial sustainability</b></p> <p>Thinking longer term to ensure that your organisation has the right business models and financial strategies to put the strategic plan into operation. We also look at reserves policies and other ways you can develop responses to risks.</p>	<p><b>Managing your team</b></p> <p>You are only as successful as your team. Yet, sometimes the ins and outs of management and leadership can take time and energy away from your core financial responsibilities. Find out what the key principles of effective management are, as well as the importance of understanding yourself and the individuals in your team.</p>
11.00-11.15 Break				
11.15 – 12.45	<p><b>Fraud and cyber security</b></p> <p>Every £1 gained from reducing fraud loss, is £1 that could have been used to help your beneficiaries. This session will give you tips on managing fraud risks and developing a fraud aware culture.</p>	<p><b>Charity Law update</b></p> <p>Keep abreast of changes in Charity Commission regulation including the legal implications of Charities Act 2016 changes to fundraising regulation in this annual legal update session.</p>	<p><b>Better annual reports</b></p> <p>Are you making the most of your trustees' report to showcase the work of your charity and to make the case for support? Get practical tips on how to make you can increase the impact of your report.</p>	<p><b>Effective performance appraisals</b></p> <p>What is the point of performance appraisals? Are they something you look forward to or is it a time you dread? This session is about bringing the joy back to your appraisals, making them productive, positive and even, dare we say, enjoyable!</p>
12.45-13.45 Lunch				
<p><b>13.45-14.30 Keynote speech</b></p> <p>The view from the Charity Commission</p>				<p><b>Nigel Davies, Head of Accountancy Services, Charity Commission</b></p>
14.30-16.00	<p><b>Providing assurance on key risks</b></p> <p>Boards need assurances that not only have key risks been identified, but that they are also being effectively managed. This session will outline practical approaches to providing assurance.</p>	<p><b>Reviewing your constitution and governance</b></p> <p>We'll help you ensure that your governing documents are fit for purpose and update them for changes in legislation and good practice. Bring governance structures and processes alive for your trustees and members so they can participate fully.</p>	<p><b>Social finance and borrowing funds</b></p> <p>Social finance has given charities a potential new source of funding. This session will delve into where the opportunities and risks are, as well as which charities are suited to social finance.</p>	<p><b>Writing better reports</b></p> <p>If putting together reports is something you'd prefer to avoid, then this session will help you. It will cover the process of compiling a report from start to finish, including planning, structuring and proof reading. We will also explore ways to make your writing style appropriate for both your readers and your aims.</p>

## About the Organisers



**Sayer Vincent** is a firm of chartered accountants that has been dedicated to charities and social enterprises for over 30 years. Through our tailored audit and advice services, we provide trustees and managers with the assurance that their charity is managing its resources effectively. As well as being commercial accountants, our team has an in-depth knowledge of the governance and management of charities and social enterprises. They can advise on a range of business activities to help your organisation achieve the best financial outcomes, always mindful of your objectives. Working with Sayer Vincent you will feel that you have extra people in your team. Find out more about our services at [www.sayervincent.co.uk](http://www.sayervincent.co.uk)

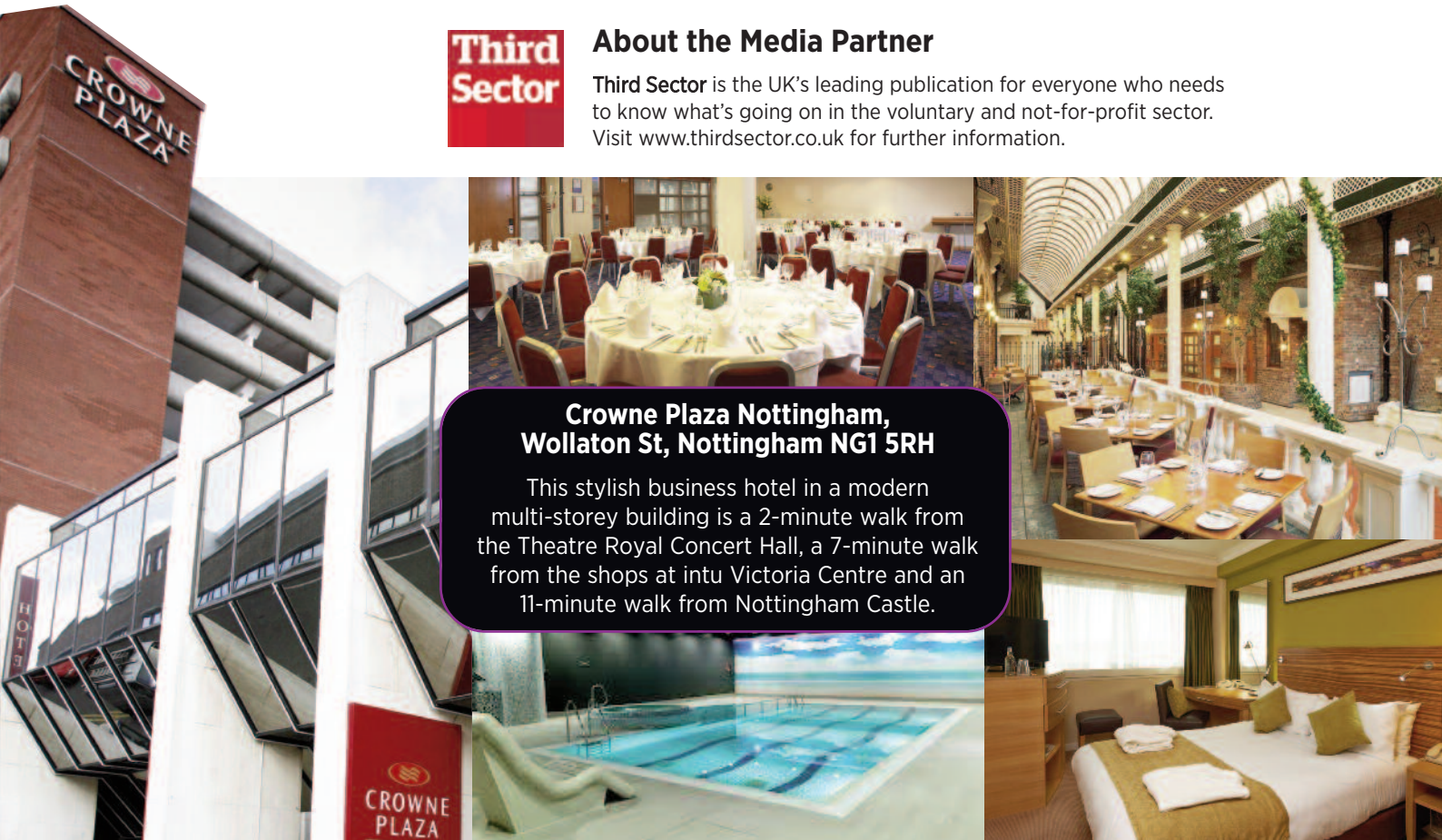


**The Directory of Social Change** – DSC is an independent charity with a vision of an independent voluntary sector at the heart of social change. DSC’s independent status and well respected research means they can challenge and create debate around government policy, trust funding, company giving, Big Lottery funding (join the Big Lottery Refund campaign at [www.biglotteryrefund.org.uk](http://www.biglotteryrefund.org.uk)) and other issues which threaten the independence of charities. DSC’s opinion is regularly sought and featured in the charity sector, national and broadcast media. DSC is the best-selling provider of training and information to the sector, running over 300 courses and conferences each year, selling over 100 different book titles and providing access to over £3.9 billion in funds via [trustfunding.org.uk](http://trustfunding.org.uk).



## About the Media Partner

**Third Sector** is the UK’s leading publication for everyone who needs to know what’s going on in the voluntary and not-for-profit sector. Visit [www.thirdsector.co.uk](http://www.thirdsector.co.uk) for further information.



### Crowne Plaza Nottingham, Wollaton St, Nottingham NG1 5RH

This stylish business hotel in a modern multi-storey building is a 2-minute walk from the Theatre Royal Concert Hall, a 7-minute walk from the shops at intu Victoria Centre and an 11-minute walk from Nottingham Castle.

A discounted rate is available for those wishing to stay on 20 September, please email Evangeline Kirupairajah: [ekirupairajah@dsc.org.uk](mailto:ekirupairajah@dsc.org.uk) for more information. This must be booked by 16 August 2017.

## Book by 03 July for early bird rate

### Delegate Fees

	Charities	Early Bird	Commercial	Early Bird
Residential *includes hotel accommodation, 3-course meal & entertainment	£650	£580	£1,050	£950
Non-residential	£550		£900	
One day	£350		£500	

## What is included in the price?

- Conference pack
- Specialist sector advice
- Certification of CPD hours
- Access to all presentations after the conference
- All refreshments over the two days including lunch
- Evening meal with wine and entertainment (residential only)

Ensuite four star hotel accommodation including:

- Complimentary Wi-Fi
- Use of the Urban Escapes leisure facilities including a heated swimming pool, steam room, spa, ice station, relaxation room and a fully equipped gym.
- Complimentary tea/coffee-making facilities in each room
- Private bathrooms with bath, shower and free toiletries
- Satellite television ■ Air-conditioning

What is not included in the price?

- Parking – £5 per day ■ Pay-per-view movies
- Treatments in the spa ■ Any additional room expense



'I thought the range of sessions was superb.'

Amy Rodwell, NDCS

'The speakers were very knowledgeable and experienced... It was an excellent opportunity to chat with colleagues and share experience about our daily jobs.'

Graciela Guerrero, Sheila McKechnie Foundation





**Join the conversation**

Keep up-to-date with what's happening at the conference: **#cac17**

**Want to Exhibit?**

If you're interested in exhibiting contact Shireen on 020 7697 4200

**Book now to secure your place:**

[www.dsc.org.uk/cac2017](http://www.dsc.org.uk/cac2017)