

# Headline speaker



**Kate Lee – CEO of CLIC Sargent**, Prior to joining CLIC Sargent in 2015, Kate spent five years as Chief Executive of the Myton Hospice Group in Coventry and Warwickshire. A former Director of Strategy for British Red Cross, she is a Clore Social Leadership Fellow and is passionate about the role and development of the social sector.

## Day two panel features:



**Russell Findlay**,  
CEO of Speakers Trust



**Tim Boyes-Watson**  
Global Director,  
Alliances & Advocacy  
at Humentum

# About the venue



## 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.

### 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)
- Complimentary parking for all delegates

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?

- Pay-per-view movies ■ Treatments in the spa
- Any additional room expense

# About the organisers

**Sayer Vincent** - Sayer Vincent is an audit and advisory firm with a social purpose. Established over 30 years ago, we provide a full range of audit, assurance, tax and consultancy services targeted exclusively at charities and other social purpose organisations. We are proud of this exclusive focus. It means that all our staff and partners have made a clear commitment to wanting to work with the sector and to deliver our objective of supporting social purpose organisations to be more effective at delivering their social impact. We measure our success on how effectively we achieve that objective. Find out more about our services at:

[www.sayervincent.co.uk](http://www.sayervincent.co.uk)

**The Directory of Social Change** - DSC has helped make tens of thousands of charities stronger for over 40 years. We're all here for you. Every single member of our team works for DSC because we have a passion for what you do, the incredible changes you make for others in the world every day.

Put simply, we provide training courses, publications, an online funding database, research, conferences, a bookshop and lots of free resources on our website such as top tips and best-practice articles. If you work for a charity we aim to support you in everything you do.

We're also fighting your corner through our policy activities - working hard to make the UK a better environment for charities to thrive in and help those you're there for.

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

## Delegate Prices

	Charities	Early Bird	Commercial	Early Bird
<b>Residential</b> Includes hotel accommodation, 3-course meal & entertainment	£650	£580	£1,050	£950

	Charities	Early Bird	Commercial	Early Bird
<b>Non-residential</b>	£550	N/A	£900	N/A
<b>One day</b>	£350	N/A	£500	N/A

**Book by 17.00 on Friday 5 July for early bird residential rate**

[www.dsc.org.uk/cac2019](http://www.dsc.org.uk/cac2019)

# Charity Accountants' CONFERENCE

19-20 September 2019  
Nottingham

Annual residential event for  
charity finance professionals



Book now at:

[www.dsc.org.uk/cac2019](http://www.dsc.org.uk/cac2019)

# The annual residential conference for charity finance professionals

This is your opportunity to keep abreast of all the latest developments in the charity finance world.

As usual the programme includes a mix of tax and regulatory updates, sessions focussed on areas of responsibility often added to the Finance Director's role (such as legal, employment and governance matters), strategic financial thinking and opportunities for personal development.

This year we have an over-arching theme on the role that meaningful financial information can play in re-building public trust in charities. This will be the theme of our opening plenary from Kate Lee of CLIC Sargent as well as a panel discussion on day two.

It is also your chance to network with other financial professionals in a friendly and informal environment.



**Join the conversation**

Keep up-to-date with what's happening at the conference: #cac19

[www.dsc.org.uk/cac2019](http://www.dsc.org.uk/cac2019)

08.30 - 10.00 Registration

09.00 - 10.00  
Optional drop-in surgeries led by Sayer Vincent



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## Day One

10.15-11.00 Welcome and opening plenary  
Re-building trust through honest reporting

**Kate Lee, CEO of CLIC Sargent** - How can we get the public to trust charities that they will spend their funds responsibly to deliver best impact? Kate will outline CLIC Sargent's approach to developing its impact reporting and being honest about the resource decisions involved.

	The essentials	Legal & governance	Finance Director's role in ...
11.15-12.45	<p><b>Charity tax made simple</b> Are you new to the charity sector or want a tax refresher? Tax issues are particularly complicated for charities. This session will cover, at a high level, VAT, Gift Aid, trading and business rates.</p>	<p><b>Introduction to charity law &amp; update on recent developments</b> This session will cover the basics of charity law that you need to know as well as an update on recent legal and regulatory changes impacting charities.</p>	<p><b>Providing assurance on management of risk</b> Boards need confirmation that key risks are being identified and effectively managed. Based on Sayer Vincent's evolving thinking on risk, this session will outline how to provide assurance using practical approaches.</p>
12.45 - 14.00	Lunch		
14.00 - 15.30	<p><b>Introduction to SORP</b> A session for those new to the sector and those wanting a refresher. This session will focus on the aspects of SORP that pose the biggest headaches for charities.</p>	<p><b>Making the Treasurer and Finance Director's relationship work</b> Together the Finance Director and the Treasurer have responsibility for the financial management and oversight of a charity. How do you work with your Treasurer? What are the key features of making this relationship work?</p>	<p><b>IT project management</b> Finance Directors often have IT responsibility too. Many major IT projects run into management difficulties and cost overruns. This session will consider how you can avoid the nasty shocks that major IT projects can bring.</p>
15.30 - 16.00	Break		
16.00 - 17.30	<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>Focus on charity governance</b> The expectations being placed on charity trustees get greater and greater. This session will consider common challenges in charity governance and give practical examples of how the challenges can be met.</p>	<p><b>Facilitating an efficient audit process</b> How can you maximise the chances of a smooth, stress-free audit process? This session will look at the question from both sides of the audit relationship including how to prepare and what to expect.</p>



**Sayer Vincent**, for expert advice on tax, financial management, governance & risk.

## 08.30 - 09.30 Optional drop-in surgeries led by Sayer Vincent



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**Russell-Cooke**, legal advisers, sponsor the legal and governance sessions on each day.

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		The essentials	Legal & governance	Finance Director's role in ...	Personal development
<p><b>Personal development</b></p> <p><b>Tools and techniques for creative problem solving</b> In our sector the challenges come at us thick and fast; poor public perception; unsupported projects; people understand the finance brief; the board ignore my financial advice based on data? Change the way you think to find new ways of overcoming challenges.</p> <p><b>Manager as coach</b> ILM research says that managers who employ coaching as a development tool see tangible benefits. It's common that managing people is more effective from a coaching, rather than managing, perspective. Help others, to help themselves and grow in their role, as well as see benefits for you, the manager.</p> <p><b>Top tips for presenting with Impact</b> You know your message is important. You know the audience can benefit from digesting it. That means your presentation planning and delivery must marry the two together. Explore useful techniques to maximise your presentation's impact.</p>	<p><b>Day Two</b></p> <p>09.30 - 11.00</p> <p>11.15 - 12.45</p> <p>14.30-16.00</p>	<p><b>Gift Aid update</b> Key changes are being implemented soon - find out more about the new rules for valuing benefits and other topical issues. This session will also cover a reminder of important elements and what to expect from HMRC.</p>	<p><b>Employment law</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>Getting your accounts to tell the story</b> This practical session will give you ideas and tips on how to develop your trustees' report and accounts to better tell the story of how your charity turns financial resources into social impact.</p>	<p><b>Integrity In leadership</b> Leadership is as much about attitude as it is about what we say and do. This practical session will take you through some of the skills needed to lead with integrity.</p>
		<p>11.00-11.15 Break</p> <p><b>Investments made simple</b> The session will give you the basics you need to be able to understand investments and to pose the key questions for holding investment managers to account.</p> <p>12.45-13.45 Lunch</p>	<p><b>Charity Governance Code - how do you shape up?</b> Over a year since the Governance Code was published, this session will re-visit the Code itself and look at how individual charity's have used the Code in practical ways to improve their governance.</p>	<p><b>Helping all staff understand finance</b> Finance is for everyone, or at least it should be. The better everyone understands finance the healthier the <i>Controls Environment</i>, and better decisions will be made. This session will explore how you can help your teams to 'get' finance.</p>	<p><b>Time management</b> Managing our most precious resource can be a daily challenge both at work and at home. Whatever your role, there are practical ways to alleviate the strain.</p>
		<p><b>13.45-14.30 Keynote speech</b> <b>Charity accounts - who, why and what</b> An expert panel will discuss and take questions on the purpose of charity accounts and how charities can make their external financial reporting more impactful. The panel will include <b>Russell Findlay</b>, CEO of Speakers Trust and <b>Tim Boyes-Watson</b>, Global Director, Alliances &amp; Advocacy at Humentum.</p>			
		<p><b>Getting the most from your accounting system</b> To produce meaningful financial information, charities need to make best use of their accounting software. This session will consider what you should expect your accounting software to provide and how to get it.</p>	<p><b>Data protection</b> 2018 saw the biggest changes to data protection law in the UK for almost two decades. This session will look at some of the key data protection challenges facing charities, and reflect on lessons that can be learned from recent enforcement action taken by ICO and the courts.</p>	<p><b>Minimising fraud</b> Recent charity fraud cases have demonstrated the risks of reliance on trust. How can you develop a balanced and practical approach to minimising fraud risk in your charity?</p>	<p><b>Wellbeing</b> Our work is important, however we often neglect ourselves in doing it. Moving our wellbeing and self-care up the list of priorities will positively impact our performance.</p>

