

THE  
Charity Accountants'  
ONLINE CONFERENCE

— FOR CHARITY FINANCE PROFESSIONALS —

Lead, impact  
and inspire

Wednesday 15 and Thursday 16 November 2023



In partnership with:



# THE Charity Accountants' ONLINE CONFERENCE

— FOR CHARITY FINANCE PROFESSIONALS —

## About the event organisers

**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 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 8,000 funders giving a total of £8 billion in funds via - [fundsonline.org.uk](http://fundsonline.org.uk).

**Sayer Vincent** is an award-winning audit and advisory firm with a social purpose. Established over 30 years ago, they provide a full range of audit, assurance, tax and consultancy services targeted exclusively at charities and other social purpose organisations. Proud of this exclusive focus, it means that all their staff and partners have made a clear commitment to wanting to work with the sector and to deliver their objective of supporting social purpose organisations to be more effective at delivering their social impact. Sayer Vincent measure their success on how effectively they achieve that objective. Find out more about them on their website - [www.sayervincent.co.uk](http://www.sayervincent.co.uk).

## Prices

Early Bird Price  
(before 02 October)

£99

£239

Standard Price  
(after 02 October)

£139

£279

Charity rate

Statutory and commercial organisations

# The Charity Accountant's two day online annual conference is back, with the aim to support attendees to lead, impact and inspire.

This year's conference programme includes inspiring and motivational speakers, emphasising the importance of financial leadership in the charity sector. Sessions and panel discussions that will provide valuable insights and information on the latest trends, best practices, and innovations in charity finance. Attendees can gain new knowledge that can enhance their financial management skills and contribute to the success of your organisations.

The conference brings together charity professionals from various charitable organisations and related fields, with the opportunity to network, build connections, actively engage with experts and peers, exchange ideas, and participate in discussions.

Stepping away from day-to-day responsibilities to attend a conference can be refreshing and rejuvenating. It provides a change of environment and perspective, which can lead to increased creativity and productivity.

### We will cover:

- Tax updates
- Fundraising for impact
- Impact reporting
- Avoiding burnout and improving wellbeing
- Charity law and governance
- High-performing teams and strategies for success
- Risk and reserves
- And many other essential topics!

### Who should attend:

Finance professionals, executives, board members, and anyone involved in charity operations can benefit from attending the conference.

### What is included in the price?

- Attendance to the conference over two days, to keynote sessions, panel discussions, breakout sessions and breakout talks.

### Get access to the post conference hub:

- Recordings of the opening and closing keynote sessions
- Recorded breakout talks (Breakout sessions, will not be recorded)
- Access to breakout sessions presentation and handouts
- Certificate of attendance for CPD hours

# In my heart I suspect that I'm a wannabe accountant

**Debra Allcock Tyler** writes about the absolutely vital role that charity finance professionals play in the charity sector

I have to confess that in my heart I suspect that I'm a wannabe accountant. I actually love figures and financial information. One of my favourite roles was sitting on the SORP committee for seven years with a whole bunch of financial experts!

But one thing that has always struck me about charity accountants and finance professionals is how very unaware they are of how powerful their voices can be in the overall work of the charity and how often their views are not sought, unless it relates to the budget.

It seems to me that often they're stuck in the box labelled 'the people who count the money and

say no' and are not given access to the sorts of decision-making that they really ought to be a key part of.

In our sector money is not the motive for the work (such as it might be in the private sector). It's the method by which we deliver our work. The job of the finance professional is to advise us on how to use that money to do the work – and they can't do that effectively if they are not a key part of the decision-making of how that work is done.

In my view they ought to be fully integrated into the decision-making structures. They should be part of the conversations about how money is raised (eg involved in fundraising strategy), part of the conversations

about how it is spent (eg, involved in the operational plans) and part of the conversations about how impactful the work of the charity is.

I think that finance professionals can forget that, certainly at board level, what they say often carries more weight than that of the CEO. Their opinion is really listened to because, let's face it, everyone worries about the money. So, to not involve them in the wider organisation's work is really shortsighted. The more they understand they better able they are to advise on how best to use the money.

Money raised is there to be spent – not to be saved – and if finance

professionals properly understand the charity they are much better placed to see where money can be diverted from, or placed to better deliver the charity's purpose.

We've always been hugely supportive of charity finance professionals at DSC. We publish loads of books and run courses to help them. But by far our most popular is our Charity Accountants Conference which we run in partnership with Sayer Vincent. So if you're a charity finance professional do come along to the conference and hang out with people who understand you, the importance of what you do and value you beyond your skills with an Excel spreadsheet!



# Day one

#CAC2023



09.45

## Welcome to **The Charity Accountants' Conference 2023**

*Speaker: Jonathan Orchard, Partner, Sayer Vincent*

10.00

## Opening keynote: **Driving impact through all you do**

Understand how to harness the power of purpose to drive significant impact. Gain insights into cultivating purpose-driven leadership, creating purposeful organisations, and leveraging impactful partnerships. Learn practical strategies for driving impact in your sphere of influence.

*Speaker: Fozia Irfan, Director of Impact and Influence, Children in Need*

[BOOK HERE](#)

## Breakout sessions

Choose from a selection of extended finance sessions:

11.15

Sessions  
will not be  
recorded,  
max of 50  
people per  
session.

### Risk and reserves

- Practical approaches to risk management
- The importance of reserves
- Developing a risk based reserves policy
- Regulatory compliance and reporting

*Speaker: Sayer Vincent*

### Impact reporting

- Integrating Financial and Impact Reporting
- Reporting Standards and Guidelines
- Case Studies and Examples

*Speaker: Sayer Vincent & impact expert*

### Understanding charity accounts

- Overview of the regulatory framework and accounting standards for charities
- Understanding the unique features of charity accounts and financial reporting
- Importance of the notes to the financial statements and their role in providing additional information

*Speaker: Sayer Vincent*

### Fundraising for impact

- Smart fundraising investments
- Diversifying fundraising strategies
- Collaborative fundraising
- Overcoming fundraising challenges

*Speaker: Sayer Vincent & fundraising expert*

13.15

**Virtual lunch** – Grab some lunch and join a breakout room to talk with conference attendees

# Breakout talks with DSC

Choose from a selection of personal development talks:

14.15

This is a recorded session.

## Teamwork and collaboration for impact

- Building effective teams and fostering teamwork
- Collaboration and cooperation skills
- Delegation and empowering team members

Speaker: DSC

## Effective communication skills

- Effective verbal and written communication
- Active listening and empathetic communication
- Presentation skills and public speaking

Speaker: DSC

## Problem-solving and critical thinking

- Analytical and logical thinking
- Creative problem-solving techniques
- Decision-making and strategic thinking

Speaker: Chrissie Wright, DSC Associate Trainer

## Adaptability and flexibility

- Embracing change and uncertainty
- Agility and resilience in a dynamic environment
- Openness to new ideas and continuous learning

Speaker: Eileen Browne, Training Consultant, DSC

## Avoiding burnout and improving well-being

- Strategies for achieving work-life balance in a demanding role
- Stress management techniques and promoting mental well-being
- Workplace wellness and creating a supportive environment
- Practicing self-care and maintaining personal well-being

Speaker: George Knight, Training Consultant, DSC

# Themed discussion tables

Networking and peer-to-peer support on specific

15.30

- You will be able to choose one out of six suggested discussion topics in an audience poll
- Once you've made your choice, you will automatically be transferred into a breakout room with all other attendees that have chosen the same topic
- Network, chat and share your thoughts with your fellow charity marketeers

Discussion topics will be revealed closer to the time. If you would like to put forward a suggestion for a discussion room topic, please contact [cs@dsc.org.uk](mailto:cs@dsc.org.uk).

# Day two



#CAC2023

09.45

## Welcome

Welcome to conference day two

10.00

## Opening keynote

### High-performing charity finance teams: strategies for success

#### Panellists:

Mark Salway, director of sustainable finance, Cass Business School  
Sayer Vincent, Auditors

Join us for an insightful panel discussion hearing from experienced finance leaders who have achieved exceptional results in their charity sector teams. Discover the key elements that contribute to high performance in charity finance teams, from effective collaboration and streamlined processes to innovative financial strategies. Learn practical tips, best practices, and actionable insights that can elevate your finance team's performance and maximise your organisation's impact. Engage in a dynamic discussion, exchange ideas, and unlock the potential of your charity finance team. Be inspired to drive excellence in financial management for the greater good.

## Breakout talks

Choose from a selection of extended personal development and finance sessions:



11.15

Sessions will not be recorded, max of 50 people per session.

### Sustainable business practices

- How sustainable are your ways of working
- Strategies for working to net zero
- Developing a sustainable supply chain

Speaker: Sayer Vincent & procurement expert

### Financial analysis and interpretation

- Techniques for analysing and interpreting charity accounts
- Identifying financial trends and patterns
- Comparing financial performance with industry benchmarks and best practices

Speaker: Sayer Vincent

### Financial governance and accountability

- Board oversight and governance of financial matters
- Financial reporting and transparency for stakeholders
- Ethical considerations and accountability in financial decision-making

Speaker: Genny Jones, DSC Associate Trainer

### Third Sector knowledge:

- Understanding the unique challenges and opportunities in the third sector
- Keeping up to date with changes in charity commission regulations and best practices
- Staying informed about trends and innovations in the third sector

Speaker: DSC, Jay Kennedy, Director of Policy and Research



13.15

**Virtual lunch** – Grab some lunch and join a breakout room to talk with conference attendees

[BOOK HERE](#)

## Breakout talks

Choose from a selection of finance talks:



14.15

This is a recorded session.

### Tax update

- Overview of tax law
- Recent changes in regulations
- Compliance and reporting requirements
- Tax complications, challenges, and solutions

Speaker: Sayer Vincent

### Investment strategies

- Understanding investments
- Risk and return and due diligence.
- Socially Responsible Investments
- Monitoring, Reporting and compliance.
- Investment policy statement

Speaker: Sayer Vincent & investment specialist

### Cyber risks

- Financial Impacts of Cyber Attacks
- Legal and Regulatory Landscape
- Risk Management and Mitigation Strategies

Speaker: DSC

### Charity law and governance

- An update on the Charities Act 2022 including insights into how new powers are being viewed or used in practice
- New Charity Commission guidance on investments (CC14) – a summary of the changes
- Lessons from recent Charity Commission inquiries and case law

Speaker: Lucy Rhodes, Senior Associate, Bates

### Fraud risk

- Understanding Fraud in the Charity Sector
- Fraud Risk Assessment
- Internal Controls and Policies
- Fraud Prevention Culture
- Legal and Reporting Obligations

Speaker: Sayer Vincent



15.30

## Closing keynote

Lead, impact and inspire

Sharing powerful insights and stories that will ignite your passion and drive to make a lasting impact, discover the principles of effective leadership that empower individuals to create meaningful change. Explore strategies for driving impact in your personal and professional spheres and learn how to inspire and motivate others to join you.

Speaker: Debra Allcock Tyler, CEO, DSC

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