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Cripplegate Foundation

High-performing charity finance teams: Strategies for success

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Who we are?

- Cripplegate's history goes back to the year 1500 where the first recorded gift, of £40, was made.
- We work exclusively in Islington and the Cripplegate ward of the City of London.
- Our vision is of a society where everyone has the opportunity to live a rewarding life free from poverty and inequality.
- My background:
 - Senior Auditor at Barnardo's 2005-2012
 - School Business Leader 2012-2020
 - Director of Finance and Resources 2020 – present

Changes in the Sector

- The importance and prominence of EDI in the sector – Unheard of concept 15 to 20 years ago...business critical, today!
- Greater innovation and creativity – Different approaches to grant-making, for example, with greater community involvement (PGMs) and approaches to power and philanthropy.
- More well-rounded approach to charity stewardship e.g. focus on social conscience and regard to charitable objects in ALL aspects of governance, as seen in new CC14.
- Changes to management approach –increased focus on wellbeing, hybrid and flexible working plus more emphasis on a balanced approach to performance appraisal e.g. 360 feedback

Role of the Finance Team

- **Adaptability** – Finding ways to ensure internal controls are comprehensive but not restrictive e.g. Covid crisis fund
- Review **financial regulations** at least annually – What is/isn't working? Where do you have too little or, even, too much control in place?
- Not just finance! Getting out of our silos and **understand the needs of your teams and beneficiaries.**
- Change in **recruitment** focus – Are your JDs preventing you from accessing the right talent?
- **Performance Management** – Link these to your corporate strategy. Balance operational targets with strategic need and career development.
- Be an **enabler** for change rather than a blocker e.g. incorporating responsible investment strategies.
- Finance professionals are important advocates for **accountability** in strategy, EDI and all aspects of charity management.

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Thank you

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