

THE  
Charity Accountants'  
ONLINE CONFERENCE

— FOR CHARITY FINANCE PROFESSIONALS —

Lead, impact  
and inspire

Wednesday 13 and Thursday 14 November 2024



In partnership with:



# THE Charity Accountants' ONLINE CONFERENCE

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## 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](https://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](https://www.sayervincent.co.uk).

## Prices

£139	Charity rate
£279	Statutory and commercial organisations

# Welcome to the Charity Accountants' Conference 2024

We ended last year's conference with an important reminder about how important you - charity finance professionals - are to the charities you work with. You support trustees to understand financial decisions, you provide key data for donors, you enable the team to get paid, you show how your charity turns its hard earned income into social impact.

This conference is your opportunity to develop your skills, knowledge and experience to perform these tasks even better. Be that through technical knowledge, strategic thinking or your own personal development. We have it all.

We have made the deliberate decision to keep the conference in an on-line format as this makes it as accessible as possible for all charities - large or small, national or local.

This year we are delighted to welcome David Hollingsworth - the new CEO at the Charity Commission - as our opening keynote speaker. Hear directly from David as to why your roles are so important and his plans for the regulator.

But above all come and join us as we all work towards building strong, effective and insightful charity finance teams.

**Jonathan Orchard**



## ‘Impact’ should be the beating heart of charity finance... not just a reporting requirement

Jonathan Orchard from Sayer Vincent talks through the importance of impact reporting

When a word or phrase grows in popularity and is used with increased frequency, it becomes easy to assume that we know what we mean by it, and that a consistent definition is employed by all. Take ‘impact reporting’ as an example.

Without a doubt, this has entered the common vernacular of the charitable sector, and it absolutely deserves that. ‘Impact’ should, without question, be the norm in charity finance, but we’re in danger of losing its true value if we only consider it at the point that reporting takes place. Would ‘impact financing’ be a more appropriate phrase to employ?

A key issue that we have here, is that because we’re considering ‘impact’ through the potentially narrow view of the reporting function, we focus too much on the outcomes, the ‘how we spent the money, and the impact it had’, and not always enough on the ‘how we should, or could, spend the money to achieve the greatest impact’.

Take as an example a hospice. Annual funding from its myriad efforts across retail, sponsorship, lotteries and the like, may support 15 inpatient beds, whilst the same level of funding could deliver at-home care to a far larger number of beneficiaries. In this scenario, the measure of impact is balanced between quantity and quality – more people may benefit from ‘lighter-touch’ hospice support, versus fewer receiving a gold-standard experience.

If we ask which of these outcomes addresses the aims and beliefs of the organisation, arguably they both do. They both have clear impact, and whichever avenue the hospice in question follows, both can be reported with confidence and pride.

Herein lies some of the problem; organisations fear or avoid impact reporting simply because of the inconsistent nature of the definition of impact itself. Sometimes ‘good enough’ IS enough, especially where ‘perfect’ is out of reach.

When it comes to the reporting of impact itself, we’ve all seen celebratory claims of ‘we’ve reached 10% more this year than we did last year...’, rarely in the same breath do we see ‘but we’ve also increased expenditure by 50% in order to do so...’

Simply, a lot of impact reports don’t dive deep into the money spent, if indeed they mention it at all!

Annual accounts, done properly, should seamlessly weave together the money spent (and the considerations that went into those spending decisions), and the outcome (the ‘impact’) of that expenditure. Rather than simply a set of figures, do the accounts meaningfully convey the whole story of the charity? Funds raised by the charity are the key vehicle that drive forward its mission and deliver its impact, however categorised. The accounts should, therefore, detail the allocation of funds in a way that illustrates the charity’s vision and mission. If they do, then the organisation’s impact has been reported too.

**Jonathan is running a session on Impact Reporting**

# Day one

#CAC2024



09.45

## Welcome to **The Charity Accountants' Conference 2024**

*Speaker: Jonathan Orchard, Partner, Sayer Vincent*

10.00

## Opening keynote:

*Speaker: David Holdsworth, CEO, Charity Commission*

[BOOK HERE](#)

## Breakout sessions

11.15

Choose from a selection of sessions:

All sessions will be recorded

Made Simple

### Charity VAT

VAT for charities can be complex and getting it wrong can be costly. This session will give you the basics of VAT for charities to help you to get it right.

*Speaker: Ross Palmer, Senior Tax Manager, Sayer Vincent*

Beyond Finance

Strategy

### Where next for risk management?

Every charity now has some form of risk register. But does that mean your managing risk? This session will go beyond the register to consider practical approaches to risk management.

*Speaker: Jonathan Orchard, Partner, Sayer Vincent*

Beyond Finance

Strategy

### Better trustees' reports

The report and accounts is an opportunity to showcase your charity to the outside world. This session will look at practical ways to use your report to tell the story of your charity and the impact it makes.

*Speaker: Fleur Holden, Partner, Sayer Vincent*

Beyond Finance

Personal Development

### Avoiding burnout and improving wellbeing

In this session, we will explore our responsibility to look after the wellbeing of colleagues. You will learn how to structure wellbeing interventions and handle important conversations that support wellbeing and mental health.

*Speaker: George Knight, Training Consultant, DSC*

12.15

### Gift Aid

Estimates have put the value of potential unclaimed gift aid at £500m a year. This session will cover what income streams can be eligible and how to claim the income due to your charity.

13.15

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

## Breakout sessions



14.15

Choose from a selection of sessions:

All sessions will be recorded



**Made Simple**

### Trustee responsibilities

Do your trustees really understand their regulatory and financial responsibilities? This session will give you the overview of these responsibilities so you can better support your trustees.

*Speaker:* Farrah Kitabi, Audit Director, Sayer Vincent



**Beyond Finance**

Strategy

### Hybrid working

We are now well into the era of hybrid working. Many of us can now work pretty much anywhere. But as this session will demonstrate, this poses some new risks from an employment and tax perspective.

*Speaker:* tbc



**Beyond Finance**

Strategy

### Investing for charities

This session will look at the considerations that trustees and staff have when investing their charitable funds. Drawing on his new book *Investing for Charities* (available from DSC), James will explain how different investing for charities can look if you start from a charity's rather than the investment industry's perspective, putting your beneficiaries back at the centre of your plans.

*Speaker:* James Brooke Turner, Investment Director, Nuffield Foundation



**Beyond Finance**

Personal Development

### Leading your team while balancing demands from your boss

Managers are like a jam sandwich – you're the sweet bit in the middle. But you're caught between your bosses and your team. This session looks at how to navigate what your team needs and what your organisation and its senior leadership are demanding of you. How do you reconcile what sometimes feels like conflicting demands?

*Speaker:* Stuart Cole, Head of Research, DSC

## Themed discussion rooms



15.30

Reflection on the day and what to achieve at the next day and after the conference. Share learnings. Encourage delegates to review recorded sessions.

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



#CAC2024



09.45

## Welcome

Welcome to day two



10.00

## Panel discussion

What CEO's really want from their Finance Director

**Panellists:**

tbc

# Breakout sessions

11.15

Choose from a selection of sessions:

All sessions will be recorded

Made Simple

Beyond Finance

Beyond Finance

Beyond Finance

Strategy

Strategy

Personal Development

## Introduction to SORP

New to the charity sector or want a refresher? This introductory session will give you an overview of the charity accounting rules (SORP).

*Speaker: Ellie Lockley, Audit Manager, Sayer Vincent*

## Good governance

Good governance is essential for essential for an impactful and resilient charity. But what does good governance really look like and how can a finance director help encourage it?

*Speaker: Judith Miller, Partner, Sayer Vincent*

## Impact reporting

Impact reporting is about so much more than listing what your charity has achieved. It should also be part of your case for support - demonstrating the 'impact chain' of how financial inputs lead to impact. This session will give tips on how to do that.

*Speaker: Jonathan Orchard, Partner, Sayer Vincent plus TBC*

## Communication, negotiation and influence

In this workshop we will identify a range of potential barriers and resistances to 'hearing the financial information'

Consider a range of communication style preferences and how to adapt to suit our audience.

Explore what makes an impactful message and consider what makes an effective question.

*Speaker: Cathy Shimmin, Senior Training Consultant, DSC*

# Breakout sessions

14.00

Choose from a selection of sessions:

All sessions will be recorded

Made Simple

Beyond Finance

Beyond Finance

Beyond Finance

Strategy

Strategy

Personal Development

## Introduction to charity law

This session will give you the basics of charity law to help you ensure your charity stays compliant.

*Speaker: Gareth Roy, Senior Associate, Russell Cooke*

## Accounting systems

Are you getting the data you need from your accounts system? This session will outline what you can expect from some of the main systems used by charities and tips on how to go about making a change.

*Speaker: Libby Hare, Partner, Adapta Consulting*

## Property issues

Property matters falls under the responsibility of many charity finance managers. This session will consider the many legal, operational and financial matters you need to know.

*Speaker: tbc*

## Where does the TIME go?

How often do we find ourselves asking this question - of ourselves?

Some days, despite seemingly working really hard, we cannot account for a single thing we have accomplished and time seems to have slipped through our fingers.

So what is getting in the way? Identifying (owning up) and removing some of the barriers we may have put in our own way is the first step.

*Speaker: Eileen Browne, Training Consultant, DSC*

12.15

## Managing restricted funds

Fund accounting is one of the key features of UK charity accounts. This session will consider the accounting and reporting issues behind restricted funds.

*Speaker: Lawrence Ryden, Manager, Sayer Vincent*

15.15

## Discussion on learnings and actions moving forward

*Speaker: tbc*

13.15

## Virtual lunch –

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

15.30

## Closing keynote

Adapting through change

*Speaker: Debra Allcock Tyler, CEO, DSC*

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