



# Day one

**08.30 - 10.00** Registration

**09.00 - 10.00** Optional drop-in surgeries led by Sayer Vincent and Anthony Collins



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



**Anthony Collins** are solicitors specialising in charity law. On day one they will be available to discuss employment and commercial law issues.

**10.15-11.00** Welcome and opening plenary

## Is it time for a revolution in charity financial reporting?

**Joe Saxton, founder of nfpSynergy** - will set out why he thinks financial reporting in charities is the next scandal waiting to hit charities after the fundraising and the safeguarding revelations. Many charity reports and accounts are far too long and impenetrable. The public want transparency and to know how their money is being spent. How can a charity do this in a clear and understandable way? Joe's session will set out the problems and a comprehensive set of solutions.

	Tax	Legal & governance	Strategic financial management	Personal development
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 – both VAT status of different income streams and VAT recovery, Gift Aid and trading – what can you do in the charity and when do you need a subsidiary, and business rates.</p>	<p><b>Charity law update</b> Keep abreast of changes in law and regulation including the Charity Commission rules and the legal implications of Charities Act 2016 changes, including fundraising regulation, in this annual legal update session.</p>	<p><b>Impact reporting</b> Demonstrating and reporting on impact is becoming increasingly important for charities. This session will highlight the key role that finance teams can play in providing supporting data, learning from the data and for using the annual report and accounts as a key element of a charity's impact reporting.</p>	<p><b>Compelling presentations</b> Most presentation skills training teach techniques, not transformation. That's good, but not enough. At the core, great presenters do one thing: they serve their audience. They do this by applying four key principles; Audience, Big Idea, Contrast, and Decision. This session will help you shift from 'delivering content' to meeting your audience's needs.</p>
12.45 - 14.00	Lunch			
14.00 - 15.30	<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>Data protection</b> By the time of the conference, GDPR will have applied for four months. How has the charity sector applied GDPR and is there more to do?</p>	<p><b>Financial sustainability</b> An interactive session to help you think longer term to ensure that your organisation has the right business models and financial strategies to put the strategic plan into operation.</p>	<p><b>Mindset for success</b> What determines why two people with the same advantages achieve radically different outcomes? It comes down to two things; how we respond to challenges and how we manage our lives. This session will give you the key mindsets and skills to enable you to win the inner battle of life.</p>
15.30 - 16.00	Break			
16.00 - 17.30	<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. Also a reminder of important elements and what to expect from HMRC.</p>	<p><b>Governance – a treasurers' view</b> Whether you have a treasurer or a trustee who takes the lead on finance, you'll want to ensure this relationship is as productive as possible. How best can you work with them and the rest of the board on the finance agenda?</p>	<p><b>The power of cost management</b> With pressure on income, it is ever more important for a charity to have an effective cost management strategy. Led by procurement specialists, this session will give you practical tips to improve cost control and to raise awareness in your charity of the potential power of cost management.</p>	<p><b>Building great teams</b> In the knowledge economy the old motivational techniques of stick and carrot often fail. This session will help you to understand how to build teams that are driven by three key motivators; Autonomy, Mastery and Purpose.</p>

**19.30 - 21.00** Dinner and entertainment





# Day two

**08.30 – 09.30** Optional drop-in surgeries led by Sayer Vincent and Anthony Collins



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

**Anthony Collins**  
solicitors

**Anthony Collins** are solicitors specialising in charity law. On day two they will be available to discuss commercial and charity law queries.

	Risk	Legal & governance	Strategic financial management	Personal development
09.30 – 11.00	<p><b>Trading and social enterprise</b></p> <p>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 rates relief.</p>	<p><b>Introduction to charity law</b></p> <p>Much of what is different in charity financial reporting has its roots in charity law. For those new to the sector, or those wishing to get a broader understanding, this session will give the basics of what you need to know on charity law.</p>	<p><b>Providing assurance on key risks</b></p> <p>Boards need assurance that not only have key risks been identified but that they are also being affectively managed. Based on SV's evolving thinking on risk, this session will outline practical approaches to providing assurance.</p>	<p><b>Managing staff effectively</b></p> <p>Learn a framework for managing people which can be applied to any management style in most organisations. The session will cover some of the key stumbling blocks for those new to people management, including defining your role, performance management and what to do when things are going wrong.</p>
11.00-11.15 Break				
11.15 – 12.45	<p><b>Grants and contracts</b></p> <p>Is your funding agreement a grant outside the scope of VAT or a contract which may need VAT added? HMRC recently finalised its guidance to help you decide. This session will look at the guidance and help you apply it to your own agreements.</p>	<p><b>Employment law</b></p> <p>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>Fraud</b></p> <p>Every £1 gained from reducing fraud loss is a £1 extra for supporting beneficiaries. This session will give you tips on managing fraud risks and developing a fraud aware culture.</p>	<p><b>Mastering your time management</b></p> <p>For staff at all levels, learn the fundamentals of time management, the skills and knowledge of administration to make you more productive, more effective and more successful.</p>
12.45-13.45 Lunch				
14.30-16.00	<p><b>13.45-14.30 Keynote speech</b> <b>Amie Woods – Deputy Head of Accountancy Services at the Charity Commission.</b></p> <p><b>The view from the Charity Commission</b></p> <p>Amie will provide an update from the regulator covering; new guidance, fraud and insights from the commission's regulatory work. You will have the opportunity to ask Amie questions on aspects of charity finance and regulation including the latest on serious incident reporting.</p>			
	<p><b>Minimising tax costs</b></p> <p>Top tips and ideas to ensure you do not pay more tax than you should by planning effectively. This will cover VAT, Gift Aid, corporation tax and PAYE looking at areas where you can be caught out with unexpected tax bills.</p>	<p><b>Intelligent reserves policies</b></p> <p>A reserves policy should be based on the financial risks faced by the charity. This session will include a charity case study and other examples of how to incorporate risk thinking to your policy.</p>	<p><b>Culture – the role of finance</b></p> <p>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>Taking the lead in effective meetings</b></p> <p>In this session you will learn good practice, including how to plan well for meetings and how to deal with controversial issues. You'll explore good practice for leading/chairing meetings and being an effective meeting participant.</p>

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