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Charity Finance Summit

10.10.2024

155 Bishopsgate, London

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Brilliant event. I look forward to this on a yearly basis to get the insight developing news and legislative changes to the Charity Sector. All the information in one place. So helpful and very informative.

BWW Mind



I am delighted to announce the line-up for Civil Society Media's seventeenth annual Charity Finance Summit. The 2024 programme has once again been developed in response to feedback and insight from sector experts, and will deliver up-to-date presentations in key topic areas of investment, VAT & tax, risk, digital & change management, and strategy & culture, alongside those invaluable networking opportunities.

While the inflationary environment has calmed down, the effects of the cost-of-living crisis has meant organisations faced and continue to face even greater pressure to deliver to an increasing number of beneficiaries while battling to maintain income levels, and control their own expenditure.

A change of government always brings renewed hope and optimism, but it remains to be seen if the necessary funding for, and demonstrable willingness to properly engage with, the sector is really there. Are charities truly operating in a new era?

Whoever is running the country, the finance function plays a central role in ensuring charities are able to fulfil their missions on a day-to-day basis, while developing resilience, enhancing stability and maximising the chances of future sustainability. Charity finance leaders are the individuals who most directly contribute to their organisation's financial health. Ensuring a charity is fit-for purpose, can meet its objectives and deliver real impact requires both knowledge and a calm approach. Access to expert advice from professional advisers, as well as communicating and sharing ideas and experience with peers, can give both insight and reassurance. The Charity Finance Summit aims to play a part in facilitating this process, as charities continue to do more with less.

We look forward to welcoming you to the conference in October..

Tristan Blythe, editor, *Charity Finance*

PROGRAMME AT A GLANCE

08:45	Registration
09:15	Conference welcome
09:20	Opening keynote
10:10	Morning sessions
12:50	Lunch
13:50	Afternoon sessions
16:25	Closing keynote
17:15	Networking reception



CharityFinance
WEEK 7-11 OCTOBER 2024

In October 2024 we will be celebrating excellence in charity finance practice through a dedicated week of events, content and thought-leadership initiatives.

To view the full programme and other events visit:

civilsociety.co.uk/CFWeek2024

MORNING SESSIONS

08:45	Registration, refreshments, networking & time to visit exhibition			
09:15	Welcome from Tristan Blythe , editor, <i>Charity Finance</i>			
09:20	Seeing the big picture at a time of change To set the wider context for the challenges charity finance teams face, this opening session will offer expert analysis and broad perspective on the issues and stories affecting modern Britain, chronicling the impact of rapid demographic, technological, economic and global change. Mark Easton , BBC home news editor			
	Stream A – VAT & tax	Stream B – Risk, digital & change management	Stream C – Strategy & culture	Stream D – Investment
10:10	Chair's welcome: Richard Bray , chair, Charity Tax Group	Chair's welcome: Ian Allsop , contributing editor, <i>Charity Finance</i>	Chair's welcome: Léa Legraien , senior reporter, <i>Charity Finance</i>	Chair's welcome: Tristan Blythe , editor, <i>Charity Finance</i>
10:15	1A. Tax deep dive – donation vs grant vs contract Determining the VAT and corporation tax liability of different sources of income has become a complex task. BDO will take you through what you can do to ensure that you maximise the return for your charity and minimise the risk of getting it wrong. Parul Anand and Chris Evans , directors, BDO	1B. Charities and risk Drawing on practical experience, this session will discuss charities and their approach to managing risk, with a particular focus on what can happen when risk management goes wrong; the Charity Commission's expectations; the two key questions for trustees and senior management; the difference between theoretical and actual risk management; and the contribution that assurance makes to effective risk management. Laura Chesham and Con Alexander , charity partners, VVW	1C. Roles and expectations of the modern charity CFO Charity CFOs are taking on more and more responsibility. Not only do they work on the financials but they are also making decisions around staff recruitment and upskilling; ESG factors to make the charity more attractive to funders and donors; fundraising innovation; understanding technology to help plug gaps eg. use of AI; and adopting new technology. This session looks at how the CFO can be supported as they become multifaceted and try and streamline processes in the modern age. Hobby Dean , senior solution consultant, Sage	1D. Divided States of America With the upcoming presidential election seen as the most important in a generation, we look at the candidates, their policies, and the potential implications for investors. Rob Clarry , investment strategist, Evelyn Partners
10:55	Networking and refreshment break			
11:25	2A. Taxation Q&A This panel of experts will answer your questions on employment, VAT and general tax issues. Phil Salmon , co-head of VAT, Nick Bustin , director of employment tax and Louise Veragoo , not-for-profit tax director, haysmacintyre	2B. Future-proofing your charity: changing with a purpose This session will explore topics including: change management – and involving your whole organisation in the process; managing the skills divide; preparing for ESG reporting; resourcing change in your finance team; and how the changing political landscape could impact your finance team. Deborah Moreton , consultant, Xledger	2C. Cultivating long-term sustainability – a case study of finance and fundraising collaboration The scale of need and opportunities for improvement are endless. To achieve the most change, greater and more sustainable income streams are needed. This session offers an insight into how collaboration between fundraising and finance can drive growth and sustainability. It will examine how the strategic case for investment in the future was developed, as well as sharing the nuts and bolts of what we do and deliver. Lisa Kiew , director of finance and operations, and Elvira Morrison , director of fundraising and communications, Maudsley Charity	2D. Charity Investment – getting it right for you This session will consider the updated CC14 investment guidance from the Charity Commission and how this may change the decisions and direction that charities may take in developing their investment strategy. It will consider how to go about aligning investment portfolios to the specific work and ethics of a charity. The benefits of a nimble and flexible investment strategy will be explored, as well as how to go about meeting ambitious income targets. The importance of a thorough annual review to ensure the ongoing suitability of the approach being taken will also be discussed. Lynne Lamont , head of charities, RBC Brewin Dolphin
12:05	Transit time			
12:10	3A. Employment tax update The law around employment tax changes constantly, and it can be easy to miss an important development. Join this session to be brought up to date on the latest regarding national minimum wage, employment status/IR35, employee expenses and benefits, and the termination payment rules. Caroline Jones , associate director, and Siobhan Waters , employment tax manager, BDO	3B. Navigating strategic change with no blank cheque As we emerge from the cost-of-living crisis and charities look to the future, how can they best think about strategy and business planning with limited financial resources? Drawing on case studies, the session will cover some of the following: navigating strategic change and transformation on a limited budget; getting the right people in the right places - establishing the right team for strategic change/transformation; forming the right partnerships; making sure your charity has a focused service offering and aligning that to different possible sources of income; and financing operational change and efficiency. Alison Taylor , CEO, CAF Bank	3C. On the spectrum: how neurodiversity can be a valuable asset in the workplace This session will explain how autism and other forms of neurodiversity can be a strength, and consider how organisations can make the workplace more accessible to those who are neurodiverse, particularly within the finance function. Sarah Appleby , head of finance, Teamwork Trust	3D. Market and investment implications of a world in geopolitical flux In a period of heightened geopolitical tensions spanning physical and ideological conflicts, as well as increasing political and economic divides, this session will aim to highlight some of the key issues and their implications for investment strategy for charity portfolios. Added to this, more than two years after the Russian invasion of Ukraine, many trustees are asking themselves about armaments and their investment policies. Are historical exclusions still relevant? Are there new technologies which are much more exposed to warfare than anticipated? Can you have an ethical defence company? Alex Dow , investment director, Rathbones
12:50	Lunch, networking and time to visit exhibition			



A great opportunity to get up to speed with recent changes and highlights in the charity finance sector.

Sophie Kisorbo, Cool Earth



An informative and well-run event. Lots of insights on the latest updates in charity finance.

Sarah Glasspool, Surrey Wildlife Trust



AFTERNOON SESSIONS

	Stream A – VAT & tax	Stream B – Risk, digital & change management	Stream C – Strategy & culture	Stream D – Investment
13:50	4A. International operations What do charities need to consider from a UK perspective when they have, or are planning, international operations? Whether setting up an overseas subsidiary, or working overseas, there are potential issues around fundraising, grants, permanent establishment, and reverse charging, among other things. Phil Salmon , co-head of VAT and Louise Veragoo , not-for-profit tax director, haysmacintyre	4B. Beyond automation: what happens when you take digital finance transformation to the next level? Automation is just the start of your charity's digital finance story. Once you've built that foundation, the next chapter is where the more impactful transformation emerges. This session looks at what happens when finance – and the wider organisation – is empowered with real-time, predictive data insights. In an intelligence-driven entity where everyone shares responsibility for the data, you start to have different conversations and, consequently, make better decisions on everything from cost management to resource allocation and strategic investments. Darren Cran , COO, AccountsIQ	4C. Making business planning more effective and joyful This session will share some new principles and practice for making your charity's business planning process more effective and more joyful. The principles were co-designed with a range of charities, based on collective experiences of the good, the bad and the ugly in existing planning processes. It will cover insights gathered about the current state of business planning in charities; why tackling business planning can be the root of greater transformational change in charities; principles for better business planning that all charities can follow to craft a more impactful approach; and a high level journey with steps to follow across a planning cycle. Gareth Ellis-Thomas and Julie Wilson-Dodd , transformation consultants	4D. Decarbonisation, demographics and deglobalisation: The 3D reset & AI We recognise that the global economy is in a phase of considerable transformation. As we navigate through these significant shifts, three key trends – deglobalisation, decarbonisation, and demographics, collectively referred to as the 3D reset – are shaping the global economy and influencing long-term investment opportunities. AI plays a significant role in the 3D reset – it is a critical enabler and catalyst for each of these forces, facilitating innovation, efficiency, and sustainability in various sectors. This session will explore what the 3D reset entails, its investment implications and how AI is a transformative technology that underpins these trends. Tom Montagu-Pollock , co-head of charities, Cazenove
14:30	Transit time			
14:35	5A. Charity Tax Group update This session will provide an update on the current taxation issues facing the charity sector, including consultations. Kerry Sykes and Harriet Latham , technical advisers, Charity Tax Group	5B. Managing the risk of cloud-based digital transformation This session will focus on identifying and mitigating potential risks associated with the adoption of cloud technologies by non-profits. It will explore strategies for project governance, data migration and customer success, with the aim of providing charity finance leaders with a roadmap for safely navigating the complexities of digital transformation, ultimately enhancing their ability to fulfil their mission in the digital age. Sharon Keegan , head of business centra, and Darrell Brislane , business development manager, mhance	5C. Philanthropic giving Finance advisers can grow their business by gaining clients while working with charities to help increase philanthropic giving. This session will explore how establishing adviser-charity relationships can enhance a charity's revenue generation from (ultra)-high-net-worth-individuals ((U)HNWI). It will also look at the changing expectations of wealth holders (GEN Z, millennials, women of wealth) and the implications for advisory firms and charities and how they invest. John Pepin , chief executive, Philanthropy Impact	5D. Assessing human-rights risks within a portfolio This session will stress the importance of assessing human rights through company supply chains, and provide practical examples of how this can be done across a portfolio. Michael Topley , head of sustainable portfolio management, Barclays Private Bank
15:15	Networking & refreshment break			
15:35	Cancelled session	6B. Demystifying the FX markets: helping charities navigate emerging market currency volatility This session explores the main challenges charities face when navigating FX volatility, and includes a discussion around what tools are available to help them protect against emerging market currency volatility, which can erode the value of the donations and grants. It will introduce how to design bespoke hedging solutions, and also delve into how charities can navigate around the major bottlenecks that exist in effectively delivering funds locally in emerging markets. Lucia Wagner , head of NGO & charity desk, Ebury	6C. Why we need to be a lot less financially efficient if we want to be a lot more financially resilient. In times of financial uncertainty and vulnerability, it can be tempting to review the cost base, make efficiency savings and cut costs. Often, for entirely valid reasons, we feel under pressure to balance the budget by making reductions to our internal infrastructure. This session will explore why it's important to resist this, what it means to be a financially resilient charity and how efficiency is the enemy of resilience. Liz Pepler , independent consultant and founder of Embrace Finance	6D. Is your climate strategy a COP-out? Traditional climate strategies have focused on tilting away from companies with higher-carbon emissions. But should we actually be investing more in such companies to tackle the climate challenge head on? LGIM estimates that engaging with underperforming transition companies could unlock between \$175bn and \$290bn of value by 2030, while reducing carbon emissions. This session will help you discover how charity investors can take real-world action to deliver on both their climate and financial goals. Laura Brown , head of client and sustainability solutions, and Nancy Kilpatrick , head of unit trust relationships, LGIM
16:15	Transit time			
16:25	The state we will be in? Panel session A panel of experts and leaders will assess and discuss the state of the sector, and whether we are really operating in a new era. Tristan Blythe , editor, <i>Charity Finance</i> (chair), Priya Singh , chair, NCVO, Kunle Olulode , director, Voice4Change			
17:10	Chair's closing remarks, Tristan Blythe , editor, <i>Charity Finance</i>			
17:15	Networking reception			



The conference allows attendees access to high quality, professional information and networking opportunities that address key financial topics.

Dariel Burdass, The Physiological Society



If you're engaged or interested in charity finance this is an event you shouldn't miss.

Richard Williams, Honorary Treasurers Forum



QUICK REGISTRATION

	Early bird (booking made by 6 Sept)	Bookings after 6 Sept
Charity Finance subscriber rate	£249	£299
Charity rate	£269	£319
Team ticket (4 places) *	£669	£789
Small charity rate (income under £1 million)	£199	£199

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Delegate name (inc title)	Position	Email	Please circle the relevant session					
			Session 1 (10:15)	Session 2 (11:25)	Session 3 (12:10)	Session 4 (13:50)	Session 5 (14:35)	Session 6 (15:35)
1.			A B C D	A B C D	A B C D	A B C D	A B C D	A B C D
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