



# CharityFinance WEEK ONLINE

23-27 NOVEMBER 2020

## Charity Finance Week 2020

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## 23-27 November

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# Charity Finance Week 2020 23-27 November



**MATT NOLAN**  
CEO,  
Civil Society Media



**JENNI O'DONOVAN**  
Head of events,  
Civil Society Media

Charity Finance Week is returning on 23-27 November 2020 and this time we are going virtual!

Set against a backdrop of the Covid-19 pandemic, charities continue to operate under immense pressure as income streams dry up, resources are squeezed, and the need for support from beneficiaries is greater than ever. Having passed through the first wave of the global crisis, now we face the reality of living with the virus and the likelihood of further socioeconomic disruption. On the flipside; innovation, digital transformation and flexible working solutions have been fast-tracked and implemented at speed.

With all this in mind, we have chosen to combine three of our successful events – the Charity Finance Summit, the Charity Technology Conference and the Charity Fraud Conference, and redesigned the programme to take place across four half-days. We hope that the opportunity to attend sessions across all three events will offer you increased support and practical guidance as you look ahead to the future.

We have also invested in one of the best virtual engagement platforms on the market which enables us to offer you a variety of networking opportunities with colleagues throughout the Week.

We hope you will join us, as we all continue to navigate the most unpredictable environment in living memory, for what promises to be an informative and inspiring week.

## Timetable for the week

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
Live sessions on Vat & Tax, Strategy, Risk, Fraud and Technology 9.30-2.40pm	Live sessions on Investment, Fraud and Technology 9.30-2.40pm	Live sessions on Investment, Vat, Tax and Strategy, and Technology 9.30-2.15pm	Live sessions on Investment, Fraud, and Vat & Tax 9.30-1.30pm	Editorial round-up

## Opening keynote: Andy Haldane, chief economist, Bank of England



Andrew G Haldane is the chief economist at the Bank of England. He is a member of the Bank's Monetary Policy Committee and chair of the government's Industrial Strategy Council. Among other positions, he is honorary professor at University of Nottingham, a visiting fellow at Nuffield College, Oxford, and a fellow of the Academy of Social Sciences. He has authored around 200 articles and four books. Andrew is the founder and trustee of Pro Bono Economics, a charity which brokers economists into charitable projects, a trustee of National Numeracy and patron of the charities Reach and Speakers for Schools.

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09:00	Time to familiarise yourself with the platform: update your matchmaking profile, connect your LinkedIn, explore the exhibition area and download expert resources.		
09:30	<b>Welcome to Charity Finance Week - Matthew Nolan</b> , chief executive, Civil Society Media		
09:40	<b>Opening keynote - Chair - Tristan Blythe</b> , editor, Charity Finance magazine, <b>Andy Haldane</b> , chief economist, Bank of England		
10:10	Transit time		
	<b>Stream A: Vat and tax</b>	<b>Stream B: Strategy, risk and fraud</b>	<b>Stream C: Technology</b>
	<b>Chair: Richard Bray</b> , finance regulatory and taxes manager, Cancer Research UK	<b>Chair: Russell Hargrave</b> , senior reporter, Charity Finance magazine	<b>Chair: Tania Mason</b> , editor, Governance & Leadership magazine
10:15	<p><b>1A. Gift Aid - is your charity claiming all it can?</b></p> <p>Those attending will hear a round-up of the latest developments on Gift Aid. They will also gain insights into topics such as membership subscriptions, donor benefits, fundraising, the importance of maintaining appropriate records and an audit trail and HMRC Gift Aid audits.</p> <p><b>Mark McGarry</b>, partner, Saffery Champness</p>	<p><b>1B. Good contracting</b></p> <p>Many charities will enter into a wide range of commercial contracts in order to operate and develop. This session will take a practical look at some of the key considerations, including:</p> <ul style="list-style-type: none"> <li>The common pitfalls in contracting and the steps that can be taken to avoid them</li> <li>The essential elements of good contract management</li> <li>Common supply chain issues which can raise reputational as well as legal issues (such as modern slavery and anti-bribery), and what charities can do to manage the associated risks</li> <li>What to do when contracts go wrong</li> <li>The implications of sustainability</li> </ul> <p><b>Edward Rimmell</b>, partner and <b>Shivaji Shiva</b>, partner, VVV</p>	<p><b>1C. Transforming a 100-year-old charity</b></p> <p>With nearly half a million young people and 165,000 volunteers, the Scout movement is the biggest youth membership body and volunteering outfit in the country. Join this session to hear how the charity has made the most of "digital transformation by pandemic". You'll hear how it has deployed new technologies to engage volunteers to deliver digital Scouting, transformed volunteer recruitment and training, boosted data collection and insight, and even - thanks partly to the coronavirus - devised new ways for Scouts to get their badges.</p> <p><b>Lara Burns</b>, chief digital officer, the Scout Association</p>
10:55	Morning break: comfort/coffee break and time to visit exhibition		
11:30	<p><b>2A. Planning for changes due April 2021</b></p> <p>Nick Bustin will talk about a number of employment tax issues which will affect charities. The deferment to the IR35 legislation happened as part of the government's special measures in response to the COVID-19 pandemic. However, what will charities need to think about ahead of 6 April 2021? Nick will also discuss guidance on redundancies, working from home reliefs, and the recent challenges to Job Retention Scheme claims.</p> <p><b>Nick Bustin</b>, director of employment tax, haysmacintyre</p>	<p><b>2B. British Council case study - an award-winning approach to fraud management</b></p> <p>In this session we will learn about what steps the British Council has taken to tackle fraud, including its zero-tolerance policy, which led to it winning the 2019 Charities Against Fraud award. The Council will also share its approach to reporting and commitment to be transparent about any fraud which happens within the organisation. For example, during 2019/20 the charity reported 136 instances of fraud in its annual fraud report.</p> <p><b>Dave Carter</b>, head of counter fraud management, British Council</p>	<p><b>2C. How to create supporters for life and increase mission impact with a connected view using Fundraising and Engagement for Microsoft Dynamics</b></p> <p>Your supporters are the lifeblood of your charity. If you are able to really get to know them, then you are more likely to retain them and increase your mission impact. In this session, m-hance's Tory Cassie and James Glover will focus on how you can build strong relationships with the people who support your charity through the use of affordable cloud technology from Microsoft. They will demonstrate some of the key features within Fundraising and Engagement for Microsoft Dynamics 365 Sales including how it can enable your charity to gain a 360-degree view of your supporters, create personalised marketing campaigns that really hit the mark, manage your volunteers, coordinate your fundraising events, efficiently process donations and so much more.</p> <p><b>Tory Cassie</b>, NFP business development consultant and <b>James Glover</b>, head of solutions architecture, m-hance</p>
12:10	Transit time		
12:15	<b>Roundtable 1: Crisis response - learning from and reflecting on 2020</b> This interactive discussion, facilitated by a chair, will give you the opportunity to share challenges that your organisation has faced and learn from the experiences of your peers.		
12:55	Lunch break: comfort break and time to visit exhibition, participate in networking opportunities, organise 1-2-1 meetings etc.		
14:00	<p><b>3A. Making Tax Digital has not gone away: What you need to remember now</b></p> <p>Attend this session for an update on HMRC's plans for Making Tax Digital, including the latest on MTD for VAT and the requirement for digital links.</p> <p><b>Verna Gellvear</b>, customer readiness and external stakeholder team, HMRC</p>	<p><b>3B. What does 'impact measurement' really mean in the charity sector?</b></p> <p>In this session, James Noble will address the challenging area of 'impact measurement' and what it means for both for charities and funders, especially in the current climate. Grounded in research and practical experience, he will outline the best approaches to take, how to allocate the right resource to it and how to define your priorities. He will explain how, by understanding what's going well and what's not, you can take steps to better serve the people and causes you support.</p> <p><b>James Noble</b>, deputy head of measurement and evaluation, NPC</p>	<p><b>3C. Seamless customer journey: A client-first approach to delivering advice</b></p> <p>For over 80 years Citizens Advice has been helping people find a way forward in the toughest of times. But never before has the service faced a challenge like the coronavirus pandemic. March 2020 saw the busiest week in history for the Citizens Advice website, with views up 40% compared to the same time the year before. At a time when free, independent advice is more important than ever, Citizens Advice had to make dramatic changes to ensure it can still be there for the people who need it. Fortunately, the charity was already working on a project called Seamless Customer Journey which aimed to deliver advice in a way that prioritises the client, rather than the channel.</p> <p><b>Rebecca Kemp</b>, director of customer journey, Citizens Advice</p>
14:40	End of sessions		



<b>09:00</b>	Time to visit the exhibition, explore the networking opportunities etc.		
	<b>Stream A: Investment</b> Chair: <b>Tristan Blythe</b> , editor, Charity Finance magazine	<b>Stream B: Fraud</b> Chair: <b>Ian Allsop</b> , contributing editor, Charity Finance magazine	<b>Stream C: Technology</b> Chair: <b>Tania Mason</b> , editor, Governance & Leadership magazine
<b>09:30</b>	<p><b>1A. Finding the right investment manager for your charity</b></p> <p>This session will distil the main points that you will need to consider when selecting the right investment manager for your charity. There are many decisions to make before launching a search. Active or passive? Pooled or segregated? Income or total return?</p> <p>It's a lengthy process for a charity to change investment managers, so it's essential you appoint one you can see yourself working with for the long term. You will leave this session better equipped to make this important decision.</p> <p><b>Elliot Bancroft</b>, investment director, and <b>Olivia Merrick</b>, investment manager, Rathbones</p>	<p><b>1B. Meeting the growing challenge of anti-corruption</b></p> <p>Many charities operate in areas in which bribery and corruption are prevalent. As the UK, US and other enforcement authorities have become more active in enforcing anti-corruption laws, UK charities face new challenges when engaging with government officials, joint-venture partners and suppliers. Based on original research, this session will discuss how corruption and bribery affect the charity sector.</p> <p><b>Dr Branislav Hock</b>, senior lecturer in economic crime, Institute of Criminal Justice Studies, University of Portsmouth</p>	<p><b>1C. Making tech accountable: Exposing abuses and shady practices</b></p> <p>Foxglove is a new tech-justice advocacy group that partners with other NGOs to challenge unfair and unaccountable uses of technology. One of its key strands of work is investigating how the government uses algorithms in the provision of public services, and whether these illegally discriminate against certain groups – a key consideration for any charity that holds contracts to deliver frontline services. Martha will profile some of the legal cases currently being pursued by Foxglove. She will explain why we should all be worried about the power of technology being concentrated in a few hands, and outline the practical steps that charities can take to help build a world where technology is used to benefit everyone, not just the rich and powerful.</p> <p><b>Martha Dark</b>, director and co-founder, Foxglove</p>
<b>10:10</b>	Transit time		
<b>10:15</b>	<b>Roundtable 2: Change management – a rising priority in a pandemic</b> This interactive discussion, facilitated by a chair, will give you the opportunity to share challenges that your organisation has faced and learn from the experiences of your peers.		
<b>10:55</b>	Morning break: comfort/coffee break and time for networking and to visit the exhibition		
<b>11:30</b>	<p><b>2A. Generating income in an era of dividend cuts</b></p> <p>Dividends have historically been a reliable and critical source of income for UK investors. Covid-19 has changed the landscape dramatically, and even if there will be some recovery in payments in 2021, we appear to be a long way from re-establishing previous levels of distribution. With fixed income assets continuing to offer slim yields, investors will have to be more creative in their approach to income generation, potentially venturing further into alternative asset classes. This is a risk that can be managed, and we offer some solutions to those seeking sustainable and growing sources of income.</p> <p><b>John Wyn-Evans</b>, head of investment strategy, Investec</p>	<p><b>2B. Colchester Foodbank case study: How fraud was tackled in a small charity</b></p> <p>Colchester Foodbank used the discovery of historic fraud as an opportunity to put systems in place to prevent further instances and to review its whole exposure to loss. This session will outline examples of the risks faced by a small charity, and consider what practical action can be taken to reduce them.</p> <p><b>Mike Beckett</b>, chief executive officer, Colchester Foodbank</p>	<p><b>2C. Using Microsoft tools to empower service users and staff</b></p> <p>Technology giant Microsoft is continually rolling out innovative new tools and features to support its mission to “empower every person and every organisation on the planet to achieve more”. But few of us can devote the time to keeping up with these, so we often neglect to use them to their full potential. Join this session to get up to speed with the next generation of assistive technologies available within Windows 10 and Office 365, and learn how these can help your charity to recruit and sustain a more diverse team and develop inclusive digital services that can support a wider range of users.</p> <p><b>Chris Hardess</b>, technical specialist, Microsoft</p>
<b>12:10</b>	Transit time		
<b>12:15</b>	<p><b>3A. The art and science of portfolio construction</b></p> <p>Good management of portfolio risk and reward starts with the setting of realistic objectives. Diversification comes from including different assets and strategies, effective timing and even paying for insurance. Judging the effectiveness of these tools and knowing what to use and when to use them is both an art and a science.</p> <p><b>David Goebel</b>, investment strategist, Smith &amp; Williamson</p>	<p><b>3B. Help for Heroes case study: Learning from the past</b></p> <p>As a charity which has experienced a variety of frauds, Help for Heroes shares its experience, insight and tips to help prevent other organisations falling victim to similar.</p> <p><b>Lucille Street</b>, head of risk and compliance, Help for Heroes</p>	<p><b>3C. Choosing the best CRM approach for your needs</b></p> <p>Remote working is likely to remain a key feature of charity workplaces in the post-Covid world, so it's imperative that your CRM system delivers everything your charity needs. This interactive session will debate and compare the potential merits and drawbacks of different CRM approaches, including considerations such as cost, functionality, security and integration with other tools and systems. Our panel will discuss the key cultural attributes needed for successful organisation-wide implementation, while factoring in key compliance issues such as GDPR and the Data Protection Act. This session is a must-attend for anyone planning to change or upgrade their CRM system, and those who want to wring more from their existing one.</p> <p><b>Chair – Ivan Wainwright</b>, CRM consultant; <b>Adrian Smith</b>: database manager, Alzheimer's Research; <b>Heather Marriot</b>, Salesforce delivery manager, Oxfam GB</p>
<b>12:55</b>	End of sessions		

09:00	Time to visit the exhibition, explore the networking opportunities etc.		
09:30	<b>Keynote – Taking stock and getting real: Learning from lockdown to enable your digital future</b> Coronavirus has propelled many charities forward by light years in terms of digital transformation, opening up ways of working that were previously deemed unthinkable. And yet for others it has driven a greater gap in their ability to harness technology to support their cause. As the dust settles, there is an opportunity to focus upon your purpose, vision and future in a world which is now firmly digital-first. In this pragmatic plenary session, Nathan will guide you through key considerations that charities should be considering such as how to maintain new ways of operating while ensuring that they are sustainable and secure; how to leverage what you have to do more and offer a better user experience; and how to thrive in a digital-first world. He will also introduce several case studies from charities that have already explored these questions and taken steps to ensure that their next stage of digital acceleration comes from a strong and resilient foundation. <b>Chair – Tristan Blythe</b> , editor, Charity Finance magazine, <b>Nathan Baranowski</b> , chief wonder maker, digital wonderlab		
10:10	Transit time		
	<b>Stream A: Investment</b> <b>Chair: Tristan Blythe</b> , editor, Charity Finance magazine	<b>Stream B: Vat, Tax and Strategy</b> <b>Chair: Richard Bray</b> , finance regulatory and taxes manager, Cancer Research UK	<b>Stream C: Technology</b> <b>Chair: Tania Mason</b> , editor, Governance & Leadership magazine
10:15	<b>1A. Responsible Investing: Truly effective change</b> At Legal & General Investment Management, we believe environmental, social and governance (ESG) factors – such as climate change, social inequality and executive pay – are financially material. So we see responsible investing as the incorporation of ESG considerations into investment decisions. Attend this session to understand how responsible investing can help you to mitigate risks, unearth investment opportunities and strengthen long-term returns for your charity. Join Sacha Sadan’s talk in order to better understand the implications and benefits of responsible investing. <b>Sacha Sadan</b> , director of investment stewardship, Legal & General Investment Management	<b>1B. VAT efficient arrangements for sharing staff, central resources and recharges</b> The sharing of overhead resources and staff can lead to unexpected irrecoverable VAT costs. However, there are a number of different ways whereby recharges and the sharing of resources can be achieved VAT-efficiently. This session will look at practical examples based on actual experiences, and the risks and opportunities to consider around this subject. <b>Debbie Jennings</b> , VAT director, Moore Kingston Smith	<b>1C. Why technology can’t be left to the experts, especially in times of crisis</b> The Covid-19 outbreak and the government’s efforts to bring it under control have rewritten many fundamental norms about data, governance, rights and responsibilities. From contact-tracing apps to state contracts handed without contest to shadowy AI firms, the role of technology has never been far from the headlines in this crisis. Against this backdrop, how can we ensure that the solutions devised are genuinely for the public benefit, and not just the most expedient technological or political fix? How can we ensure that public policy considerations are given at least as much weight as scientific ones? How can we hold to account those that steward or use our data? And, crucially, what role do charities play in tackling these important questions? <b>Reema Patel</b> , head of public engagement, the Ada Lovelace Institute
10:55	Morning break: comfort/coffee break and time to visit exhibition		
11:25	<b>2A. Music and song writers: stories from the Covid-19 financial frontline</b> Song writers and musicians have been particularly impacted by the closure of venues during Covid-19, and the grant-making of the Performing Rights Society Members’ Fund (PRSMF) – underpinned by investment income - has never been more needed. Pete Glenister, finance committee chair of the PRSMF, shares insights into the financial, governance and broader impacts in the music world. <b>Pete Glenister</b> , finance committee chair, PRS Members’ Fund <b>Julie Hutchison</b> , charities specialist, Aberdeen Standard Capital <b>Laurence Gagen</b> , head of Charities – London, Aberdeen Standard Capital	<b>2B. Interaction of VAT and tax when considering having a trading subsidiary</b> This session will look at when there is a need for a trading subsidiary and how to manage the interaction of VAT and trading issues when diversifying your income and assessing the need for a subsidiary. We will cover the need for a subsidiary, VAT groups, VAT on recharges between a charity and its trading subsidiary, joint employment, maximising VAT recovery when having a subsidiary, and typical income streams which breach the primary purposes rules for charitable trading. <b>Alison Hone</b> , partner, Saffery Champness	<b>2C. Everything has changed: Coronavirus and Save the Children</b> Before Covid-19 turned the world upside down, Save the Children UK’s new CIO was just launching a new IT strategy that would include a new CRM system and a programme of transformation that would take in supporter engagement, programme delivery and the digital workplace. But with income expected to fall significantly this year and many staff stood down on furlough, this work has all had to be reprioritised and considered through a new lens. Join this session to hear how Jon Curry has managed the challenges and opportunities that the crisis has brought, and how he plans to re-establish the momentum for change in a future that looks nothing like the past. <b>Jon Curry</b> , CIO, Save the Children UK
12:05	Transit time		
12:10	 <b>Roundtable 3: Leadership in 2020 – motivating a dispersed workforce</b> This interactive discussion, facilitated by a chair, will give you the opportunity to share challenges that your organisation has faced and learn from the experiences of your peers.		
12:50	Lunch break: comfort break and time to visit exhibition, participate in networking opportunities, organise 1-2-1 meetings etc.		
13:30	<b>3A. The end of the road for the traditional 60/40 portfolio?</b> We discuss whether the 60/40 portfolio, the bedrock of charitable investment portfolios for the past four decades or so, is still fit for purpose as we enter into a potentially new regime for investment. We discuss potential challenges to the 60/40 – both now and in the future – and what alternatives trustees can consider to protect and grow their investment portfolio. <b>Ajay Johal</b> , investment manager, Ruffer	<b>3B. Best practice to drive collaboration between finance and fundraising</b> This presentation will focus on the unprecedented impact on fundraising streams as a direct result of the Covid-19 pandemic and examine how finance and fundraising teams can best work together to achieve maximum benefit for the organisation. They will unpick the importance of the relationship between finance and fundraising departments in order to weather the storm. From planning future fundraising activities through to developing a better understanding of issues such as compliance, risk, ROI and sustainability. <b>Gemma Sherrington</b> , executive director of fundraising and marketing, Save the Children	<b>3C. Empowering finance teams with digital transformation: what you need to know</b> Charity finance teams are under pressure to respond to the challenging economic climate. Pressure on fundraising and increased demand for service delivery means having to remodel and reforecast on faster timescales to support stakeholder’s strategic decisions. Doing this whilst working remotely and running the usual monthly reporting schedules brings additional stress. Cloud Doing Good have worked with charities large and small to deliver agile cloud based financial reporting to help deliver operational improvements and deliver on their mission. Join this session to learn best practice for charity finance teams and to hear directly from charities that have put this into practice during lockdown. <b>Iain Goldman</b> , founder and partner, Cloud Doing Good
14:10	End of sessions		

09:00	Time to visit the exhibition, explore the networking opportunities etc.		
	<b>Stream A: Investment</b> <b>Chair - Tristan Blythe</b> , editor, Charity Finance magazine	<b>Stream B: Fraud</b> <b>Chair - Ian Allsop</b> , contributing editor, Charity Finance magazine	<b>Stream C: Vat and Tax</b> <b>Chair: Richard Bray</b> , finance regulatory and taxes manager, Cancer Research UK
09:30	<p><b>1A. What is a charity's responsibility to be responsible and why is it important?</b></p> <p>In addressing this question, Neville will consider the regulatory landscape, but also how the adoption of a holistic policy approach can strengthen and protect a charity's reputation in the fulfilment of mission. In particular, Neville will focus specifically on ensuring your charity has a well-aligned investment portfolio, and why investing responsibly and sustainably is no longer a "nice to do" but a necessity in the age of social media.</p> <p><b>Neville White</b>, head of responsible investment policy and research, EdenTree</p>	<p><b>1B. Preventing charity fraud: Insight and action - the regulatory perspective</b></p> <p>One in 25 charities in England and Wales will suffer fraud in the next two years, and according to the Charity Commission the biggest impact is reputational. This session will offer a regulatory perspective on fraud in the charity sector, and present some of the key statistics, findings and conclusions from the Commission's most recent research, commissioned in partnership with the Fraud Advisory Panel.</p> <p><b>Alan Bryce</b>, head of development, counter fraud and cyber-crime at the Charity Commission</p>	<p><b>1C. Cash repayments via creative sector tax reliefs - is your charity missing out?</b></p> <p>Alice Palmer will explain which companies can access various reliefs and how the rules work. Although some of the reliefs are targeted at specific sectors (for example, theatre tax relief for theatrical companies), others are much more widely drawn and can be accessed by many differing types of charities. Alice will help you understand whether your charity could access the tax relief and whether it could be a valuable source of income for your charity during these difficult times.</p> <p><b>Alice Palmer</b>, tax manager, haysmacintyre</p>
10:10	Transit time		
10:15	 <b>Roundtable 4: Planning for uncertainty - how to survive in a post-planning world</b> This interactive discussion, facilitated by a chair, will give you the opportunity to share challenges that your organisation has faced and learn from the experiences of your peers.		
10:55	Morning break: comfort/coffee break and time to visit exhibition		
11:25	<p><b>2A. What has 2020 done for charities' investment strategies?</b></p> <p>Looking specifically from the aspect of:</p> <ul style="list-style-type: none"> <li>• Overall challenges to the balance sheet and sources of income</li> <li>• Potentially increased demand given the negative impact Covid-19 has had on society</li> <li>• Fundraising</li> <li>• Investment performance</li> </ul> <p><b>Pradeep Kachhala</b>, director, institutional group, SEI Investments</p>	<p><b>2B. Lessons from the pensions industry</b></p> <p>This session will explore how the pensions industry has addressed fraud, which is estimated to cost it many millions of pounds a year. Pension scheme trustees and administrators play a key role in educating and protecting members from scams, and the PSIG has developed a code of practice to help them do this. The body also promotes the importance of transparency in fighting fraud.</p> <p><b>Margaret Snowden OBE</b>, chair, Pension Scams Industry Group</p>	<p><b>2C. Update on VAT reliefs for digital advertising services</b></p> <p>HMRC has recently issued its updated policy with regard to the VAT treatment of digital advertising services, and adverts placed on social media. This area has been under review by HMRC for a number of years, and this recent guidance provides clarity on what services can be supplied to charities at the zero rate, and what services are subject to VAT at the standard rate. The overall position is good news, and this session will provide practical guidance and commentary on what charities and their suppliers need to do to ensure that opportunities for benefiting from VAT reliefs are maximised.</p> <p><b>Geraint Lewis</b>, VAT director, Moore Kingston Smith</p>
12:05	Transit time		
12:10	<p><b>Closing panel discussion - where next?</b></p> <p>Having passed through the first wave of the global Covid-19 crisis, we now face the reality of living with the virus. A gloomy economic outlook and widespread societal disruption is likely to have far-reaching implications for the way we live and work. Charities of all shapes and sizes have seen major income streams fall away overnight and are still grappling with the ramifications. Yet in spite of all this, across the sector we can find many reasons to be encouraged, from innovation in service-delivery through to the widespread adoption of digital technologies. Charities have stepped up against the odds to support and protect the most vulnerable in society. Our panel discuss what "building back better" might look like for their own organisations and what learnings they hope to take forward in order to pave a path to recovery.</p> <p><b>Chair - Russell Hargrave</b>, senior reporter, Charity Finance magazine</p> <p><b>Confirmed panellists - Martin Houghton-Brown</b>, chief executive, St John Ambulance, <b>Paula Laird</b>, director of finance and IT, WaterAid, <b>Henny Braund</b>, chief executive, Anthony Nolan, <b>Kris Murali</b>, director of finance and resources, The Scouts</p>		
13:10	<b>Thank you and concluding observations - Matthew Nolan</b> , chief executive, Civil Society Media		
13:30	End of sessions		

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# CHARITY FINANCE WEEK PARTNER EVENTS

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## **MICROSOFT DYNAMICS 365 FOR CHARITIES | MOVING YOUR FINANCE SYSTEM TO THE CLOUD**

WEDNESDAY 7TH OCTOBER 2020 • 9:30-11:30AM

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Join Microsoft Gold Partner Xpedition to learn how charities are modernising their finance systems to increase efficiency and cost-savings. Our experts will be discussing the variety of charities we have helped move to the cloud and how they are benefiting from a tailor-made, all-in-one financial management solution, powered by Microsoft Dynamics 365 Business Central. Including:

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## **TURNING SURVIVAL INTO SUCCESS USING A FINANCE SYSTEM**

WEDNESDAY 25TH NOVEMBER 2020 • 2:00-4:00PM

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Xledger is proud to be sponsoring the Civil Society's Charity Finance Week for the second year.

As a key part of their involvement across the week Russ Emmerson from Xledger is looking forward to hosting a webinar where he will cover the insight, automation and freedom to work remotely you get from Xledger's cloud-based finance software. This helps his clients to not only maintain their status quo in an uncertain world, but also helps them to grow, change and improve their finance function. During the webinar you will hear industry experts guide you through:

- What functions your finance software must have to succeed (fund reporting, automation and insight explained)
- How Xledger has helped clients maintain their financial ambitions in an uncertain world
- A chance to ask the experts your questions

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### Sponsor or supporter enquiries

Yvette Micallef

Yvette.micallef@civilsociety.co.uk

### Registration enquiries

The events team

events@civilsociety.co.uk

### Media enquiries

Kirsty Brown

Kirsty.brown@civilsociety.co.uk

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