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Above and beyond

Life beyond lockdown is this month's theme and it seems apt that I've started to pen this editorial from behind a desk in White Lion Street. This is the first time I've stepped foot into CFG's office since joining last September, and I must confess to feeling a bit excited! Behind the scenes, it has taken a lot of time and energy to assess the risks, rearrange and organise the office, and accommodate staff safely. I feel secure and confident working here, perhaps because we're not all rushing in at once.

The future of the office is the subject of our cover story this month (page 7). Charity finance leaders talk candidly to David Ainsworth about office life beyond lockdown and what it looks like for their organisations. As David notes, the pandemic has raised dozens of

questions about how we work, and many will remain unanswered for some time to come.

While there is much uncertainty about the future, one thing that is clear is that flexibility will be key. On page 9, Carla Whelan considers the practical issues around flexible working requests, and on page 11 Rachel Rand explains how flexibility was at the heart of National Children's Bureau's approach to digital innovation. You can hear more from Rachel at CFG's 2021 Annual Conference which is just days away. If you haven't booked your tickets, it's not too late. Please turn to page 12.

Our Annual Conference wouldn't be possible without the incredible support of our sponsors, partners and members. On page 13, we conclude our 'Meet our Sponsors' series with SmartSimple's unique perspectives on this year's theme Leading the Way: Effective, Inclusive, Resilient.

Someone who knows all about resilience is Steve Mahon of Mencap Liverpool & Sefton. On page 10, Steve shares how the charity survived the pandemic and

kept a laser-like focus on members' needs during and beyond the lockdown. If there is one take-away for me this month, it's that it is difficult to remain resilient – as individuals, organisations and as a sector – without the solid support of others.

I want to take this opportunity to echo the words of Caron (page 5), and many others, in wishing our colleague and friend Roberta Fusco the very best for the future. Roberta has provided immense support to so many during her time at CFG, going above and beyond, particularly during the pandemic when so much was in a state of flux. We thank her. Roberta is heading to charity Living Streets where she'll continue to shine a light and, undoubtedly, lead the way.

Emma Abbott
Communications Manager



“You need to be aware of what others are doing, applaud their efforts, acknowledge their successes, and encourage them in their pursuits. When we all help one another, everybody wins.”
– Jim Stovall

APPLY NOW!

CFG launches new bursary for BAME charities and finance teams

A new bursary scheme that aims to support BAME-led charities and finance teams has been launched.

CFG's new scheme will fully fund 15 CFG memberships, each with a place on CFG's flagship training programme – [Inspiring Financial Leadership](#) (IFL).

Run each year between October and May, in partnership with [Sayer Vincent](#) and [Bayes Business School](#), IFL has worked with dozens of charity finance professionals to develop their leadership skills. The course draws on leadership research and tackles the current challenges facing charity leaders. The course is wide-ranging and includes eight modules that have been specifically developed for finance professionals.

Launching the new bursary scheme, Caron Bradshaw OBE, CEO of CFG, commented: “Over the past 19 months, BAME communities have been significantly and disproportionately impacted by the Covid-19 pandemic and this has increased the pressure on BAME-led charities who continue to deliver for the people and communities they serve.

“Along with our partner organisations, CFG has been focusing on the steps we can take to ensure under-represented groups within the sector have access

to the training and networks they need from infrastructure bodies like ours.

“We're proud to be launching this new bursary scheme in time for the new IFL cohort to begin in October. We are committed to supporting all finance professionals, whatever their career stage, and we recognise the part that leadership skills play in helping to further careers.”

BAME charities and BAME-led finance teams who are not members of CFG are invited to apply for the bursary scheme which will cover the costs of CFG membership and the IFL course.

The deadline for applications is **9am Monday 4 October**, so don't delay! To find out more and to apply, visit [CFG's website](#).



Charities optimistic despite pandemic pressures

More than a third of charities have reported feeling positive about their prospects as the country recovers from the pandemic. The results from our latest joint Covid Charity Tracker Survey with Pro Bono Economics and CloF found that 37% of charities felt more positive about their situation between April and June this year when compared to the previous three months.

This optimism comes despite two-thirds of charities facing a hike in demand for their services over the same period, as well as staff shortages due to the 'pingdemic'.

The latest edition of the COVID Charity Tracker by PBE, in partnership with Charity Finance Group and the Chartered Institute of Fundraising, found that:

- In total, 37% of charities felt more positive about their operating environment between April and June compared with the previous three months, while 25% felt less positive and 38% felt no change.
- Two-thirds of charities (66%) experienced an increase in demand for their services between April and June this year.
- Six in 10 charities (60%) reported members of their workforce self-isolating or affected by a member of their household self-isolating due to the 'pingdemic' in July and August.

In the week prior to the Charity Tracker survey going live in July, there were an estimated 850,000 Covid infections and almost 700,000 had been 'pinged' by the NHS Covid-19 app in England alone.

With rising demand on services and staff forced to isolate, over half of charities (52%) said the 'pingdemic' impacted service delivery.

In a positive sign for the post-pandemic future, the survey found charities were slightly more likely to have increased spending in the period from April to June this year, when compared with January to March.

These rises have mostly been driven by expenditure on the workforce, with almost three in ten (28%) reporting growth in payroll costs and a quarter (25%) saying they had spent more on staff training and development.

Charities also look to be continuing to capitalise on the shift to digital during the pandemic - almost half of respondents (44%) reported increased spending on digital technology and IT equipment in the previous quarter.

According to the survey, almost a quarter of charities (23%) still have staff furloughed, slightly below the national rate of 28%, while half of these charities reported that less than 5% of their workforce is affected.

Encouragingly, most of the charities surveyed do not expect to see job losses because of furlough ending. Only 7% of charities expect the end of furlough to have a negative impact on the size of their workforce, with just 1% classifying this expected impact as "significant".

[Read the full survey results.](#)

Gift Aid Awareness Day 2021: Are you ready?

Every penny counts for charities in 2021 so this year's Gift Aid Awareness Day is more important than ever. On 7 October 2021, charities will take to social media to raise awareness of this vital tax relief.

Gift Aid is worth £1.3 billion to the sector, but every year more than £500 million goes unclaimed. Now in its fourth year, this one-day campaign raises awareness among donors and volunteers to #TickTheBox.

To help charities claim more, a range of activities for charities will be held on the day:

- a Gift Aid webinar with HMRC, open to CFG members and non-members.
- a dedicated Gift Aid helpline for charities run by Buzzacott. [Email Events](#) for more information and to book a confidential consultancy session.
- the publication of the updated Guide to Gift Aid.

Caron Bradshaw, CEO of CFG, comments: "CFG's fourth Gift Aid Awareness Day on 7 October is an important day in the charity calendar. This year, we're encouraging the sector to come together on social media to share the impact and importance of Gift Aid. That small act of ticking the Gift Aid box makes a huge difference to so many lives. This day gives us an opportunity to both express our thanks to those who have supported vital charitable work during this past year and encourage more people to tick the box."

[Download the 2021 GAAD Social Media Toolkit.](#)

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Ran in partnership with Sayer Vincent and The Centre for Charity Effectiveness, this online course also has a bursary scheme available to under-represented groups.

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MEMBER MATTERS

WELCOME TO OUR NEW CHARITY MEMBERS!

- [St Nicholas Hospice \(Suffolk\)](#)
[Social Care Institute for Excellence](#)
[The Sutton Trust](#)
[Health Data Research UK](#)
[The London Library](#)
[The Royal Navy and Royal Marines Charity](#)
[Longborough Festival Opera](#)
[Gendered Intelligence](#)
- [The Garden Museum](#)
[Everybody Sport and Recreation Limited](#)
[Islamic Relief Worldwide](#)
[Changeworks Resources for Life](#)
[Plus \(Providence & Linc United Services\)](#)
And hello to our new corporate partners...
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[SAGE intacct](#)

Serviced office space to rent in Lambeth

The New Economics Foundation is looking for an organisation to share our open-plan office with internet and tea/coffee included in the price.

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- 3) Ensure your organisation's details are up-to-date in our online members' area **MyCFG**.

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Have your say in CFG's policy work

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Join free monthly meetings on key topics

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Write an [editorial](#) or [speak at an event](#)

Take a deep dive into issues with our [special interest groups](#)

SMALL CHARITIES: HAVE YOUR SAY!

We have recently circulated a [survey to our small charities](#) asking to hear from you. We want to grow a robust offering to our new charities in membership from the Garfield Weston Bursary and we to get to know you better. What keeps you up at nightHow we can support you better? Please take a few minutes to have your say and [complete the survey](#).



GIVE US A SMILE!

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Choosing our reply



Caron Bradshaw OBE
CEO, Charity Finance Group

There is phrase I use a lot, which has come to mind frequently over the last few weeks, that is: ‘Yes, and’. It’s a term which comes from the world of applied improvisation - a protocol that allows things to happen in creative and unusual ways, building on what has been said or done. It’s a way of accepting whatever is presented without belittling or undermining an idea. It forces you to accept what is good and build upon it.

Frequently, across the sector the response to each other is ‘No’ - outrightly rejecting the actions of an individual or organisation - or ‘Yes, but’- undermining the efforts made. Put into context this might be ‘No, you got engagement with government all wrong’ or ‘Yes, but xyz was wrong with your approach’. Both responses create hostility, defensiveness or withdrawal. They march us down a cul-de-sac of tension and conflict and fail to move the debate on.

I live by the mantra that we need to do more listening to understand rather than

reply. ‘Yes, and’ is a lesson in doing just that. It requires me to put down my ego, preventing me from rejecting things simply because they were not done my way, and moves me into a space where I can hear and consider others’ perspectives. ‘Yes, and’ enables you to build on the positive contributions that have been made as an alternative to squashing them (and the people who have invested their energies in them).

To give you a specific and real example: During the pandemic, the government

“
We have to work without fear or favour and that means choosing a positive and constructive approach even in the face of unrealistic and impractical assertions.

were open to supporting specific causes and subsectors, but they were not sure who to support or how to identify where the greatest need lay. We were asked to help pinpoint the individual charities and causes who would be most hit by the pandemic.

Our reply was very much ‘Yes, and’. We provided a detailed report, drawing on all sources, which answered the questions asked as far as practicable. We highlighted that identifying and reaching the specific organisations in need required a focus on business model and financial wellbeing beyond cause or subsector. In other words, we worked with what was asked of us and tried to build understanding and partnership to deliver the jointly desired outcome of supporting beneficiaries impacted by the pandemic.

We have always been very clear that our primary focus was not to save the institution of charity. But just as it makes no sense to discuss breathing without mentioning lungs, you cannot talk about serving beneficiaries without talking about organisations. Serving beneficiaries

drove our MobiliseNotMothball #RightNow and #NeverMoreNeeded campaigns.

Imagine what the response to, and engagement with us, would have been if we had replied, ‘No, you’ve got it all wrong it’s pointless targeting specific subsectors so we’re not going to waste our time pulling together data’!

Or if we’d squashed the Government’s willingness to try and identify those charities in most need by saying ‘Yes, but there isn’t any data anyway and it won’t show you what you think it will’? I also question who we would have served if we’d have simply given the government what they wanted; a list of who to save.

Some commentary on the success or otherwise of the sector’s efforts, particularly in influencing government, would very much lead you to conclude our approach couldn’t have been further from ‘Yes, and’ if we’d tried. Over the course of the pandemic, I may not have agreed with every approach, policy or detailed discussion. I may have been at times frustrated, despairing even, but ‘Yes, and’ was a guide-star.

It’s our job to protect those we serve and to know when and how to engage with their interests in mind. It is not our job to garner acceptance or praise from our fellow leaders, particular civil servants or specific MPs. We have to work without fear or favour and that means choosing a positive and constructive approach even in the face of unrealistic and impractical assertions.

But our work is hard, and we are not the only actors on the stage. Sometimes all we can do is unequivocally reject what has been said or done because the alternatives would be reckless. We have to know when to say no too.

To give a specific and real example again - [the response of Children England](#), and many of their members, to the placing of unaccompanied children into hotels, breaching their rights and risking their wellbeing, could only be ‘No’. Even with drawing a clear line at unlawful practice, they are still willing to offer a ‘Yes, and’ with their

expertise and resources. If the wrongful treatment of children is put right first they will continue to help. Charities need to engage with where the policy is at in reality, and the real harm that does, not just be helpful in any way possible based on what we wish the policy would be.

People may fear ‘Yes, and’ and worry it leads to accepting bad ideas. It’s true, there is inherent risk in saying ‘Yes, and’ when faced with significant power inequalities, or where the partner you are working with repeatedly defaults to ‘No’ or ‘Yes, but’ in reply. It can also put you off if those with whom you are engaging view anything less than an unfettered ‘Yes’ as self-serving and lacking a can-do attitude. But the risk is far greater in blindly accepting an idea or position which breaches law, regulation or natural justice. That’s not can-do or ‘Yes, and’ it’s being a *yes-man*.

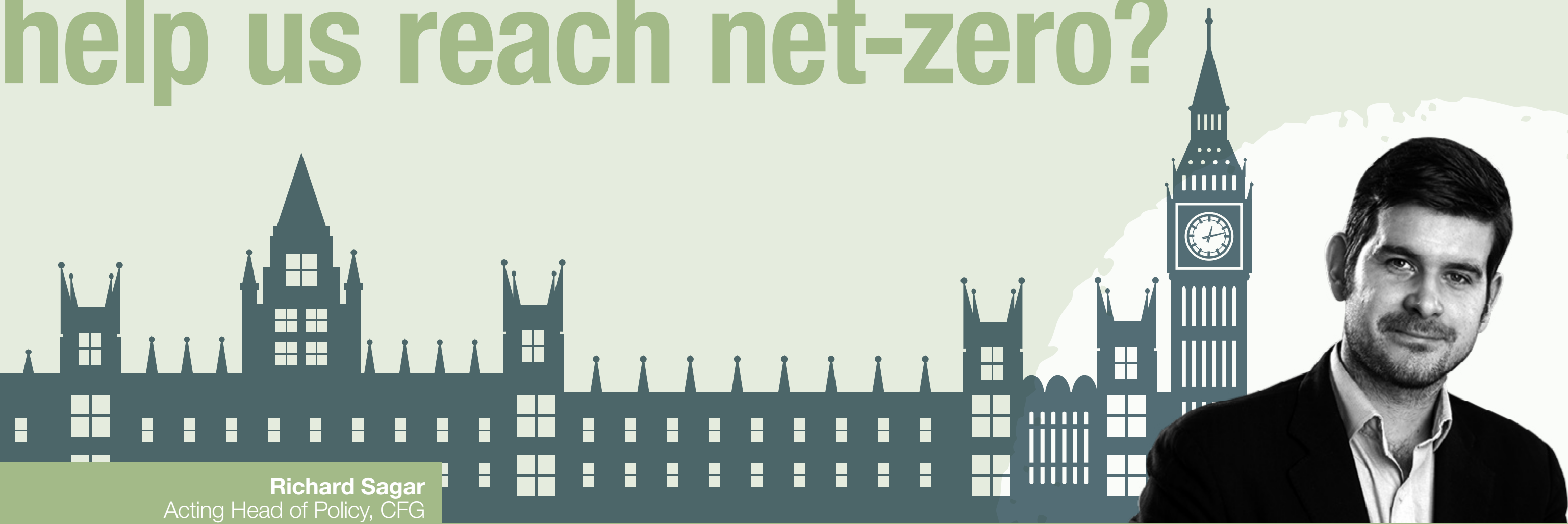
I sincerely hope that the collaborative energy and true understanding that many of the actors on the sector’s stage have built over the last 12-18 months continues.

And for others, I hope that they try to be a little more ‘Yes, and’, resisting the allure of the scene stealing ‘No’ or ‘Yes, but’. It may get them in the spotlight for a bit, but its closes down cooperation and limits the outcomes for the people who really count – the beneficiaries.

On a personal note...

It is with a heavy heart that I note our superb Director of Policy and Communications is moving on, to a director role at Living Streets. We will miss Roberta, but wish her the very best for the future. I wanted to take this opportunity to thank Roberta for the huge and significant work she has undertaken for the benefit, not just of CFG members, but for the whole sector. Work starts to find a successor but in the meantime Richard Sagar, our Policy Manager, will be Acting Head of Policy and we welcome John Tranter who is supporting us with a number of key areas.

How can charity finance help us reach net-zero?



With five years passed since the signing of the Paris Agreement, and the next meeting of the UN Framework Convention on Climate Change (UNFCCC) COP26 taking place in Glasgow at the end of the year, there has not been a better time to think about how your charity can help aid in the transition to net-zero carbon emissions.

Charity Finance Group is clear that it is no longer a case of if charities need to aid in the transition to net-zero, but how they can do so most effectively and quickly. It is in this context that CFG, alongside our partners PwC and CCLA, will be launching a publication early next year which will provide charity finance teams, trustees and leadership teams with the information and guidance they need to help make the transition to net-zero carbon emissions.

Reducing our footprint

It's usually the operational steps that charities can take – such as improving the energy efficiency in their building or how they can encourage cycling amongst employees – that come to mind when looking to reduce our carbon emissions.

CFG is clear that it is no longer a case of if charities need to aid in the transition to net-zero, but how they can do so most effectively and quickly.

However, many of the financial issues that finance professionals tackle on a weekly basis will have an equally significant, if not greater, impact on your charity's overall footprint.

Assisting charity leaders

Our new publication will provide finance teams and trustees with the tools needed to ask the right questions and will include a helpful jargon busting section and FAQs. By drawing on a range of expertise, the publication will also cover what to consider when looking to reduce the carbon impact of your finances.

Other topic areas that will be discussed include how to:

- align investments in a net-zero world
- meet existing carbon reporting requirements, such as the Streamlined

By drawing on a range of expertise, the publication will also cover what to consider when looking to reduce the carbon impact of your finances.

Energy and Carbon Reporting (SECR) requirements

- stay ahead of the game in reporting your carbon impact so as to provide a benchmark when making any reduction in your emissions
- consider the potential changes your charity should make in procurement, banking and pensions.

The aim of the guide is to assist charity finance leaders to engage in conversations on the subject, discover the approaches that fit each charitable purpose and, ultimately, take action to help reach net-zero.

Get in touch

If you would like to find out more about contributing to the publication, or would like to help shape the topics and questions that we should include to best help your charity, please [email me](#) for more information.

Over and out

This is my last column for *Finance Focus* as I will soon be moving on to pastures new. I am so proud of what we have achieved over the past few years and during the pandemic, and thank you, CFG members, for your support and guidance.

I urge you to continue to support the fantastic policy and communications team at CFG who work tirelessly to ensure we are doing all we can to promote a financially confident, dynamic and trustworthy charity sector.

I have been very lucky to work with such a brilliant team and I know they will continue to deliver the very best for you. CFG Policy and influencing work will be left in the very capable hands of Richard Sagar, who will become Acting Head of Policy until a new Director of Policy and Communications is in place, and Emma remains your 'go-to' person for all communications activity, including campaigns, *Finance Focus* and press media enquiries.

In other news, the past month has bought us a Spending Review, which we have been planning for, and a Budget and a Cabinet Reshuffle which came as a surprise. In other news, we have been working with colleagues from across the charity infrastructure sector to prepare our Spending Review submission, which focuses on three core contexts of how charities can effectively contribute to the levelling up agenda through the Levelling Up Fund and the establishment of a Community Wealth Fund. [Read more on our website.](#)

Following the Cabinet Reshuffle, we are still awaiting confirmation that there will be a Civil Society Minister at all. The biggest issue on our radar over the coming weeks must be to establish where in government accountability lies for our sector – and that is a job that may take some time.

Roberta Fusco

How will the charity office look after Covid-19?

David Ainsworth
Sector Journalist

As we settle into the end of lockdown, charities are thinking about what their office environment will look like in the future. CFG talked to finance leaders to find out what they are thinking about.

The Covid-19 lockdown is over – for now at least. For charities, like many other employers, that is likely to mean a return to the office. But this brings with it a host of challenges. How long will it be before staff return to their desks? How much will things go back to normal, and what will be different forever?

For finance directors, who often find themselves with responsibility for all core functions within a charity – HR, IT, logistics, health and safety – this creates a big set of challenges. Finance Focus spoke to a number of FDs to discuss the key questions they were facing.

Getting staff back to the desk

As staff return to work, different charities have had to face different challenges. One of the biggest divides has been between those whose staff mostly worked in an office, and those whose staff mostly did not.

Most charities had employees working in face-to-face roles, from housing staff at the Joseph Rowntree Housing Trust, to medics and pilots of Devon Air Ambulance, to curators and guides of Historic Royal Palaces. Those workers are mostly back at their posts, while office-based staff are still mostly at home.

All said office staff would eventually return - but not yet, and not for five days a week.

Some charities have been quicker to plan a return than others, but most have adopted a wait-and-see approach.

There was a general feel that it would be spring before a clear position emerged.

Everyone saw the threat of Covid-19 still present. Many were concerned that the winter months might see a new spike, and most did not expect a settled routine until spring, at the earliest.

What happens next?

At most charities, staff want to go back to the office, but two to three days a week. Sue Hall, Finance Director of Historic Royal Palaces, says the back-to-the-office drive from staff is mostly about team-building and creativity.

“People are coming in mostly to talk to each other and not to work,” she says. “It depends so much on the job and also on the personality of the individual. Some of the most creative teams are desperate to get back together. They need to talk, to bounce ideas off each other while they work. It’s too restrictive to just have calls.

“A lot of my accountants, on the other hand, I might have to drag into the office. They have a much better set-up at home.”

Most charities said they had carried out all-staff consultations, and found huge enthusiasm for flexible working.

“There are different forces pushing in different directions,” says Stuart Coe, Deputy Director of Finance at the Joseph Rowntree Foundation. “What we’re hearing from most staff is that they want to do three days in the office. Those who want to do more or less are in quite narrow bands. So what we’re going to do is listen for the next three months and see how it’s working for people and for the organisation. It’s not a one-and-done situation.”

“*...what we’re going to do is listen for the next three months and see how it’s working for people and for the organisation. It’s not a one-and-done situation.*”



Coe says there has been little change in productivity while staff are at home, but people have been logging on earlier and logging off later. “That’s not what we want to see happen,” he says. Finance leaders are concerned about balancing the needs of the organisation with those of employees, and the difficulty that this brings in being fair to everyone.

“Staff communication is really important,” says Dave Hawes, Finance and Infrastructure Director at Devon Air Ambulance. “We need staff input and staff buy-in to whatever we decide.

“The problem with asking for input, though, is that people then expect you to act on what they say. But you have to balance their desires against the needs of other staff, and the needs of the organisation. That means that whatever decision we make, it won’t make everyone happy.”

Younger people face a particular problem with this new set-up, says Rohan Hewavisenti, Chief Finance Officer at Amnesty International. “It’s tough at the start of your career,” he says. “Young people starting out need guidance and advice. They also haven’t got the same resources at home. They may struggle if they can’t get access to more senior staff.”

Tony Dowrick, Director of Corporate Services at Young Lives vs Cancer, says that charities will have to adapt to a new set of staff expectations in order to retain employees. “The cost of losing people is considerable,” he says. “If people are going elsewhere then that brings with it the costs of recruitment and also the disruption. If you don’t have an attractive proposition your staff turnover will go up, your costs will go up, and the quality of your work will go down.”

For charities in different parts of the country, the challenges are different. In London, staff have grown used to saving money on expensive season tickets over the last two years, and many have happily foregone a long commute. Many are also worried about the exposure risk that comes with public transport, and there is generally

“*We want our organisation to have a home – a place that’s ours. We think that’s important.*”

greater enthusiasm for more homeworking. At Amnesty, says Hewavisenti, some staff have already started to move out of London in the expectation that it will make financial sense in the new world of work.

Do you sell the office?

With staff likely to be in the office less, post-Covid, finance leaders are now modelling the impact of new ways of working. Many charities are thinking again about their property. Those that own expensive buildings are wondering if they can be sold or sublet. A lot of charities are thinking of remodelling – reducing desk space, and creating more meeting pods and conference rooms.

Dowrick says his charity is trying to plan for the long term. “We want to look at what the world will be like in three years, and work back from there,” he says. “It’s not about the next six months.”

He highlights a number of lenses through which his charity wants to look at the question – an inclusive workplace, environment and sustainability, staff wellbeing, fundraising, volunteering, suitability to the new social and technological environment, transparent flow of information, and making sure that the right people are in the right place at the right time.

His organisation will establish three or four base scenarios, and consult to see which

one works best, he says. One thing that he has ruled out is an all-virtual solution. “We want our organisation to have a home – a place that’s ours,” he says. “We think that’s important.

“We’re thinking that we might stay in our London offices, for example, but occupy half of what we occupy right now. We have leases until 2023 and 2024, and we can afford to have evolution, not revolution.”

Working patterns are also under consideration. Will all staff want to come in from Tuesday to Thursday – creating an environment where as many desks are needed, but just for three days a week?

For Historic Royal Palaces, there is particular challenge. Their offices are royal palaces dating back hundreds of years. On the one hand, the rent is free. On the other, it’s not easy to repurpose. “Plus, part of the attraction of joining us is that you get to work in a palace,” says Hall. “We don’t want to lose that.”

Finance leaders are also looking at changes in support and remuneration costs. Who will reap the benefits of reduced travel costs – employers or employees? Will the organisation need to spend more or less on technology to accommodate the new hybrid working regime? Will new contracts and expenses regimes be needed? What new training will be needed?

And then there is the headache of meetings where half the staff are virtual, and half in a single location. While all-virtual and all-together both work fine, the half-and-half variety of meeting is rarely successful. The most successful solutions have been “if one person is online, we’re all online” but that requires discipline.

Finally, the change in ways of working may offer a chance to change recruitment patterns, with more focus on recruiting the right people, and less focus on where they are based.

Hewavisenti says his charity has already started to recruit more people elsewhere in the world.

“We have more flexibility to recruit people based on what skills we need, not where they are based,” he says. “And we’re an international organisation. We need to recruit more people to do more work closer to where the problems are – the countries where human rights abuses are occurring.”

Key principles

So far, the process has thrown up more questions than answers. The charities that *Finance Focus* spoke to for this article have taken different approaches depending on their internal culture, their business model and their needs. Different teams have taken different approaches, with some focusing more on immediate problems such as staff safety, and others worrying more about the longer-term changes.

However, the challenges identified have been similar – a hybrid working environment, and what that means for staff engagement; the danger of Covid and the employer’s duty to mitigate it; and the changes to working patterns which will emerge.

In all cases, it is clear, there are both benefits and drawbacks, and many issues which must still be addressed and finalised before the new world of work in the charity sector eventually emerges.


About David Ainsworth

David Ainsworth is a freelance writer, editor and journalist who has covered the charity sector for 12 years.

NEXT MONTH

We’ll be looking at the highlights from the CFG Annual Conference and taking a closer look at the issue of risk.

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Managing flexible working requests

Carla Whalen
Senior Associate, Russell Cooke



“
It’s a good idea to meet with employees to discuss their request.”

Over the past 18 months or so, most charities have had some staff working from home. Arrangements differ from charity to charity, often governed by the nature of the services they deliver, but very few charities have seen no increase at all in homeworking.

As Covid restrictions lift and things begin to return to normal, charities are likely to see an increase in flexible working requests from employees who want to continue to work from home, at least for some of the time.

While the law around flexible working hasn’t changed, the demand for homeworking is likely to increase in the coming months, which could mean charities have to make difficult decisions about what can and cannot be accommodated.

No right to work from home

Employees do not have a legal right to work from home. In recent months, the

government’s flexible working taskforce has recommended that flexible working should become the default position for all workers, and the Welsh Government has announced an initiative to encourage long-term remote working, but there are currently no plans to make changes to the flexible working legislation.

Under existing laws, all employees who have 26 weeks’ service can make a flexible working request. This could be a request for part-time working, flexible or compressed hours, a request to work from home permanently, or for a ‘hybrid’ or ‘agile’ working arrangement (where working time is split between the home and the office).

Charity employers must deal with requests in a reasonable manner and make a decision within three months (unless both sides agree a longer period). If an employer wants to reject a request, the refusal must be for one of eight statutory reasons – these include the burden of additional costs, detrimental effect on quality or the ability to meet customer demand, and inability to reorganise work among existing staff.

Practical considerations and risks

Although the legal framework hasn’t changed, modifications to working practices during the pandemic will have had an impact. For example, it may be difficult for a charity to say that homeworking can’t be accommodated because it is unaffordable, or would have a negative effect on services, if everyone has been working from home without significant disruption for the last year.

This is not to say that it will be impossible to turn down flexible working requests in

“
A charity may have legitimate concerns about the impact of home working in the long-term.”

the future. A charity may have legitimate concerns about the impact of home working in the long-term – we know that some employees reported feeling isolated and unsupported at home during lockdown, and an entirely home-based workforce could have a negative effect on staff training and development, performance management, and team working.

On the other hand, a charity that mandates a full-time return to the office for all staff without exception could risk losing valued employees who decide to move to another organisation that can offer them some flexibility. There might also be a negative impact on staff wellbeing, a risk of grievances, or even grounds for a discrimination claim.

Managing risks

Charities should take time to consider all flexible working requests. It’s a good idea to meet with employees to discuss their request, particularly if it may not be possible to agree to what they’re looking for. It may be possible to reach a compromise, or to agree to a trial period if there’s uncertainty about whether a proposed arrangement will work in practice.

Taking the opportunity to meet with employees will not only help to maintain a positive relationship of trust, it could alert the charity to any risks of discrimination claims. For example, someone might need

to work from home because of a disability or a woman might ask to work from home on certain days for childcare reasons.

There is no denying that it can be challenging to manage several requests for homeworking where not all can be accommodated. The circumstances of each person’s request should be considered and employees who have rights under discrimination law should be given preference. Although it may not be possible to please everyone, taking the time to show that a request has been given proper consideration should help to limit the risks of grievances, resignations, or claims.

About Carla Whalen

Carla is dual qualified in England and Scotland, having qualified as a solicitor in 2012. Carla joined Russell Cooke in 2017, becoming a senior associate in 2019. Carla supports charities and other third sector organisations with all aspects of data protection and employment law.

A bright future

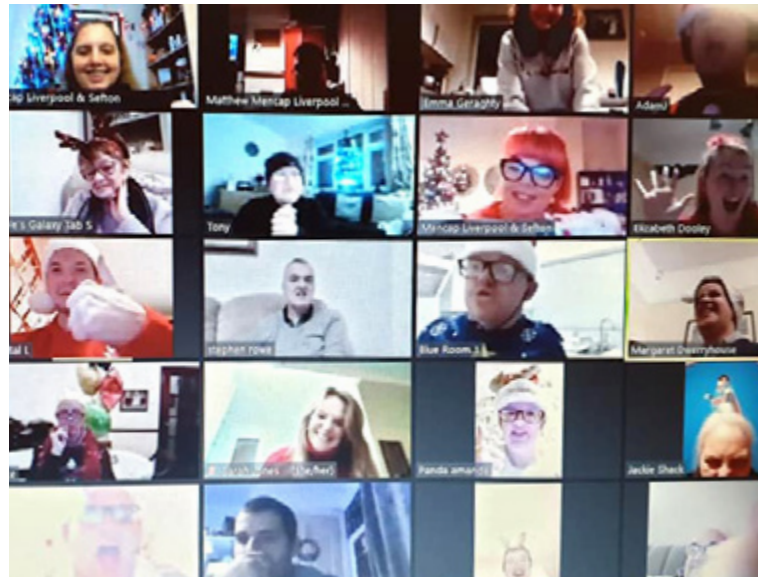


This month, Steve Mahon from Mencap Liverpool & Sefton talks to *Finance Focus* about how this small charity is managing change during uncertain times.

► Please tell us about Mencap Liverpool & Sefton and the work you do

We are a learning disability charity working across Liverpool and Sefton. We are affiliated to the national charity Mencap, so part of a wider network but, as with all ‘network partners’ we’re separately governed (and financed).

Our work is mainly funded through grants and donations with a small slice of our own income earned through training activities.



Addressing social isolation has been the primary focus of our work for the past 10 years. Any adult with a learning disability in Liverpool or Sefton can be referred to our outreach team who then work with the individual to help build their confidence and address the issues they may be facing. Often problems are with benefits, food poverty, housing, hate crime, unemployment etc, which aggravate any physical and mental health conditions. Of all the problems we see, social isolation and loneliness are by far the most pervasive.

As the outreach team work to ‘steady the ship’, our beneficiaries, whom we refer to as members, start engaging with our social groups, workshops, travel training, befriending programme and physical activity sessions. We refer to this as the ‘progression phase’ and is mainly funded through short-term project-specific grants.

Members feel empowered to ‘package’ their lived experience as they move into the final phase of our member journey, ‘Packaging’. This takes many exciting and inspiring forms: acting as peer-mentors;

speaking at national conferences; organising fundraising events; doing interviews for radio and TV; taking an active role in our governance, delivering and designing training; producing their own podcasts; and developing accessible materials such as Easy Read. Our Packaging phase is funded through our Directions Programme – we’re part of a local ESF consortia helping to reduce the barriers faced by those wanting to move into paid employment.



► What have been your biggest financial challenges over the past year as a small charity?

Like all charities, both large and small, it has been not just a question of surviving throughout the pandemic but also trying to look ahead and picture what life might be like post-lockdown.

Our CEO, Sarah Jones, was very proactive from day one, seeking what was possible to apply for under Covid Emergency Funding particularly from Liverpool City Region. In addition, exploring options with existing funders who were receptive to the needs of smaller charities in these extraordinary times with the Government seemingly oblivious to the needs of the sector.

Having achieved £68k Covid-19 funding in the first quarter of the financial year, we were able to revise projections and cash flow and revisit these key factors on an almost weekly basis. It was important to keep the trustees abreast of our financial position and there was an acceptance that a small deficit would be recorded which was remarkable given the unprecedented circumstances we found ourselves in. Applications for grant funding became the financial focus and an acknowledgement that if we achieved one in three we would be able to keep ourselves afloat. The CEO’s knowledge, communication skills and network were invaluable.



► What are your plans for a sustainable future?

In late 2018, Mencap Liverpool successfully merged with South Sefton Mencap to save the latter from closure. The merged charity is now working from Mencap Cottage, a very large, detached house, built as a children’s home and given to South Sefton Mencap in the 1960s. The location couldn’t be better, situated several hundred yards from Crosby Beach, home of Anthony Gormley’s Another Place. The benefits to our members, particularly those based in Liverpool, are immeasurable.

As well as developing the income generating potential of our member-led activities, we have exciting plans to develop the house. The first phase has been to develop a community-based cycle garden, having successfully applied to the Liverpool City Region for an environmental grant. A pop-up café is also part of the plans and we are looking to engage the local people of community and open the doors to the work we do. There is plenty of scope for

other local organisations and charities to utilise the facilities we offer either on an individual or small group basis. The charity, Blood Bikes is a good example of this.

The charity has undergone remarkable change in three years and we took advantage of a break clause in the rent for the Liverpool office and decided to base ourselves in Sefton which made economic sense and also is the catalyst for the current strategy.

Members, staff and trustees are all engaged in an exercise to discuss and exchange ideas to arrive at a new vision and mission for Mencap Liverpool & Sefton and equally importantly the values we want to incorporate in this listening, caring and courageous charity – our future is bright.

What is your top tip or learning from the past year that you would like to share with other small charities?

To be aware of what is available in terms of emergency funding, and talk to similar organisations to help and assist each other.

About Steve Mahon

Steve joined the Sector in 1995 when he became Director of Finance & Resources for BGWS (later to become Together Trust). He became the first Regional Trustee of CFDP in 2000 helping to establish the North & Midlands regions.. He moved to Bluecoat Liverpool in 2008 before setting up a consultancy for small charities on Merseyside in 2012 where he first encountered Mencap Liverpool and becoming an adviser. He was invited to join the Board and became Treasurer before becoming Vice Chair in 2018 as the Charity merged with Mencap Sefton.

How we drove innovation, inclusivity and resilience



Next month at CFG’s Annual Conference, National Children’s Bureau (NCB) and Adapta Consulting will be sharing their insights and experiences on digital innovation and inclusivity. Here, Rachel Rand, Strategic Director of NCB, talks to Finance Focus about how she has been ‘leading the way’ through the pandemic and beyond.

What has NCB done to ‘lead the way’ in 2020/21?

National Children’s Bureau’s approach to digital innovation – a process which had begun well before the COVID-19 pandemic – has seen us explore more flexible methods of working both internally and in how we engage with our external stakeholders, a large and diverse group ranging including young people, parents, professionals working in health, education, social care, justice etc, as well as local and national government.

As a result of this work, when the pandemic struck, we were able to move very quickly to purely online delivery methods. Very soon, we started seeing far greater levels of engagement, sometimes engaging with certain people for the first time. One thing that helped with this was putting ourselves in the shoes of our users when designing services. Our well-embedded ‘user-centric’ approach fitted well with the very similar ‘audience-focused’ mindset our partners at Adapta Consulting were encouraging us to adopt

with digital innovation. This meant that we could naturally think about the people we worked with, and take into account what we knew were often busy, hectic lives. We ensured that, when we delivered services digitally, we were able to do so at a time and in a location that suited – quite a contrast to the traditional face-to-face methods, which take place on specific dates and times, and usually with the need to travel somewhere. **How did you ensure everyone was on board?** Over the past 18 months we have had a strong focus on clear and timely communication with staff. We have tried to be transparent, sharing the reasoning behind decisions, and communicated even when there was no substantive new information – if nothing is said there is a risk we feel things are being hidden from us. We have responded to the increased levels of uncertainty but by extending our financial

planning horizons and actively asking if the long held ‘facts’ about our business model still remain the case. This is an ongoing process and one which felt daunting at the outset but has become increasingly energising and a process around which senior staff are coalescing. **What should other finance leaders be doing to help their charities ‘lead the way’?** When times get tough we need to evolve to survive and even thrive. Too often finance is seen as blocking spend and therefore stifling the entrepreneurial spirit so necessary for development and growth. Controlling spend is vital, but investment is also essential to long-term financial sustainability. Finance leaders can lead the way by challenging all areas of the organisation to think entrepreneurially and supporting subject matter experts to develop robust business cases to enable decision makers to make risk-assessed investments of precious capital. **What do you believe are the key ingredients of a resilient and effective charity?** **Clear strategy:** No organisation can be resilient and effective unless everyone is pulling in the same direction.



Strong leadership and clear communication: It is vital that all areas of the charity know what each other are doing so they can truly be more than the sum of their parts. **Focus:** Our capacity is not limitless and better results can normally be achieved by focusing on a few priority areas rather than trying to do everything at once. This can require difficult decisions to be made. **Permission to change our mind:** This may feel counter to clear strategies, strong leadership and clear focus but doggedly pursuing an idea in the face of growing resistance may prove to be a futile waste of resource. Create a clear process for regularly reviewing the original premise in the course of a project with clear permission to change the direction if required. **What do you need from government at this time?** As a country, as well as a charity, we need the government to put children and young people at the heart of the recovery.

“Controlling spend is vital, but investment is also essential to long-term financial sustainability.”
“The pandemic has affected every single child in the country, causing untold disruption to their education, development and welfare. Children with disabilities, those suffering from trauma, and the millions living in poverty have been hit the hardest. Yet the money promised to help their recovery falls far short, and sends the message to struggling families that they simply aren’t a priority for the Government.”
Continued on page 12 ►

MEET OUR SPEAKERS



We have all be navigating through the unknown and feeling that I'm not alone but in the company of other members of CFG has been a lifeline at times.

(Anna Feuchtwang, Chief Executive of the National Children's Bureau)

Why are events like CFG's Annual Conference helpful/important?

Time for reflection: We are all busy, all of the time and the risk of focusing on the urgent at the detriment of the important is ever

present. I find events like the CFG's Annual Conference a great opportunity to pause, reflect and re-prioritise my energies.

Knowledge sharing: Learning what others are doing brings valuable perspective to the work and direction of your own organisation. I find this especially true for smaller teams or organisations where you may be the only subject matter expert in an area, or indeed leading an area in which you have no formal training or recognised expertise.

Networking: I have valued my networks in the sector more than ever over the past 18 months. We have all be navigating through the unknown and feeling that I'm not alone but in the company of other members of CFG has been a lifeline at times.

Thanks for sharing your thoughts with us, Rachel!

LAST CHANCE TO BOOK!

Don't miss out on this year's biggest charity finance event. **Book today!**

Join us to find out more!

Join NCB's Rachel Rand and Keith Collins of Adapta Consulting on Day 3 of **CFG's Annual Conference 2021** on 13 October 2021.

The session will discuss NCB's approach to digital innovation, with a focus on how the organisation delivers services. The speakers will outline how this has not only helped the organisation be more effective and cope with the pressures of Covid-19 but has driven far greater levels of engagement with beneficiaries (sometimes with a ten-fold increase in audiences and engagement) and provided additional level of inclusivity, with some able to be and feel included for the first time following a switch to digital.

Rachel Rand comments: "From this session, we're hoping that delegates will start to understand more about what 'digital' really means, will appreciate the mix of cultural and technological factors involved in such initiatives, and – ultimately – be more confident supporting and working with colleagues responsible for areas such as IT, service delivery and engagement."



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- National Autistic Society
- Independent Age
- Wellcome Trust
- RNIB
- Blind Veterans UK
- National Children's Bureau

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Leading the way with SmartSimple

In the last, but by no means least, part of our 'Meet our Sponsors' series, Nell Dodge of **SmartSimple** shares thoughts on how charities can lead the way in being more effective, inclusive and resilient.



How do you work with finance leaders to help their charities 'lead the way'?

SmartSimple's goal is to empower our community, enabling them to manage the full life-cycle of their grant process within a carbon-neutral cloud-based solution. We engage regularly and encourage them to collaborate together through user groups and shared ideas. We believe in leading by example, so when Covid-19 hit we offered free configuration of application forms to

any of our charities who were offering related funding. Our key objective when supporting the needs of finance leaders is to establish an unbroken audit trail and approvals process within SmartSimple, enabling them to report in real time and demonstrate good corporate governance.

What are some of the key ingredients of a resilient and effective charity and/or finance team?

Some of the key ingredients include:

Adaptability: If the pandemic has taught us anything it's that those charities and organisations who had the ability to quickly adapt and pivot were the most successful both in getting additional funding to distribute but in distributing it where it is needed in the most effective way. In turn they need to avoid creating a custom



The beauty of the charity sector is everyone is working to a mission and willing to share knowledge.

solution unique to their own needs and where possible migrate to a configurable platform, which gives them the room to make their own changes and at speed when needed.

Innovation: Accomplishing something today in a way that works well doesn't mean that this will still work well tomorrow. We see innovation and the constant internal introspection and improvement as a key ingredient to success. Work with a vendor who is constantly developing functionality in line with the market needs as opposed to you trying to keep up on your own.

Leadership: Having a leadership team that listens and responds is important. Even if you have a team ready to adapt and innovate, if you don't have buy in from key leadership the ideas may not be successful.

Partnership: Working collaboratively with like-minded colleagues, attending events like these where networking is encouraged, and participating in discussions for what IS working and what is NOT working openly with other charities. View your ecosystem as a community and decide how best you can communicate, interact and share best practices. The beauty of the charity sector is everyone is working to a mission and willing to share knowledge.

Impact: What is working well? What isn't working? Impact starts with good data and it continues on to a clear and easy to understand interpretation of the data that can be absorbed to effect positive change. You can share this impact with the world, but you can also evaluate it internally to push your innovation in the direction that matches your key goals. It is also key to work with your finance team in identifying what key metrics you need to capture and measure performance against. Only ask you applicants / donors relevant questions which create data you can use to derive reporting from and measure impact.

In your experience, what steps are charities taking to be more inclusive/resilient/effective?

Charities are taking key steps to improve by moving to digitalisation. What was once a 'plan for the future' – similar to working from home, suddenly became absolutely necessary. Where you could pass a paper

across the desk to someone standing waiting for a response, now becomes an email. Where you want to accept applications in paper format or review things in excel and show 5 other people, is now being done through a secure cloud-based solution. Charities that are successful are looking for their next steps. How do we make a move that is both GDPR compliant, better for the environment, and yet allows us to work from anywhere effectively? This is it.

What do you see as the big issues facing the sector currently? What do charities need to be thinking about or aware of in 2021?

We think the bigger issues people are thinking about is what's next? The focus has been (rightly) on Covid19 during the past 1-2 years. Now there is a definite movement to align with the United Nations' Sustainable Development goals where charities are looking introspectively at what are we already funding and what UN SDG goal does that fall under? We are seeing quite a lot of requests for consultants on the digitalisation space as well where charities know they need to move online but are maybe apprehensive or looking for the best possible approach to do so. We also see charities engaging more both online with each other and potentially in person as the world begins to open up.

Why is the CFG Annual Conference helpful/important to charities and organisations like yours?

It's vital to have this space to share ideas, to network, to learn from each other and engage. For charities this is a key ingredient to success, and for organisations like ours, who work with charities (like many of the attendees) it gives us a space to showcase what we are about, how we partner with charities, and even the direction other charities are going in.

As we work with around 400 organisations around the globe, we bring our 20 years of experience to the table and our understanding of what has worked, but mostly we are here to listen. We want to understand fully the current pain points and to innovate alongside you to continue to meet these pain points with solutions. In addition, we want to understand what challenges CFG's members see in regard to capturing good data, enabling them to meet the ever-evolving Governance, Risk and Compliance (GRC) needs.

Meet Nell and the **SmartSimple** team at **CFG's Annual Conference 11-14 October 2021**. Book your place now and don't miss out on the charity finance event of the year!

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EFFECTIVE INCLUSIVE RESILIENT

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The lease of our worries...



Antonia Swinson
CEO, Ethical Property Foundation

CFG member Ethical Property Foundation is the go-to property advice charity for the UK voluntary sector. Each week, queries pour into their free property advice service, answered by experienced chartered surveyors and solicitors. EPF also offers free online training and consultancy services. This month, Antonia Swinson offers advice to a local rugby club with an issue about their lease...



We currently have a 15-year commercial lease from the local council for our clubhouse which is due to expire 31/7/22. It looks like the lease is contracted out, so we have no security of tenure as such. We want to explore options regarding renewal (we have not had any official notices yet). The building was provided as a shell and we have fully fitted it out ourselves using volunteers.

For the last eight years, the council have never invoiced us, chased us nor demanded rent off us. Our local councillor tells me that the council lease department is quite poor at collecting and issuing. I have been reticent to contact them until now.

You are so sensible to be addressing this well in advance - you think July 2022 is a long way off but in terms of negotiating a new or renewed lease it isn't - especially when dealing with council property departments. Unless the council has some reason to alter things, they are likely to write a few months before.

Some pointers for you:

1. Yes you have no right to renew under the relevant legislation (1954 Landlord and Tenant Act) and if you had, it's not automatic that you'd get another lease.

2. Work out what you want; what changes in the lease you'd wish to see and for how long. Are you wishing to invest more funds in the clubhouse?

3. Approach the council and say the above and why you are coming early to it. You might need to raise funds and need a long lease to justify the grant/donation-based on a long lease. Ask simply, is it willing to grant another lease?

4. What permissions/understanding did you have from the Council for all the work you have done? Anything in writing? It might affect the rent you pay and, should you have to leave the premises, what sums you are liable for.

5. If the council is willing to grant a new lease, the normality is for it to give you proposed Heads of Terms setting out the terms of the lease. You do not have to accept but can/should negotiate depending on the strength of your bargaining position.

How important are you to the council? And consider whether you get a surveyor and solicitor to act for you; the council is not acting in your interests! EPF would be happy to refer you to a solicitor on our Register of Property Professionals who provide advice on a pro bono and discounted fee basis.

HELP IS AVAILABLE!

CFG's Member Helplines are run by our expert member community. If you have a technical problem or query, you can dial into professional advice and information, whenever you need it.

The helpline topics include:

- Accounting and Tax, with Crowe UK
- Managing Financial Difficulties, with MHA MacIntyre Hudson
- Legal General Advice, with Russell Cooke

- HR & Employment Law, with Mills & Reeve
- Pensions General Advice, with Spencer and Partners;
- Property, with Charity Property Help and Ethical Property Foundation
- Recruitment During Covid-19, with Goodman Masson

Visit the CFG website for more information.

Countering charity fraud

Andrea Deegan
Director, RSM



According to the Charity Commission, fraudsters have stolen more than £3.5m from charities during the pandemic. The true scale of fraud is likely to be much higher as often incidents of fraud are under-reported.

According to the Charity Commission, fraudsters have stolen more than £3.5m from charities during the pandemic. The true scale of fraud is likely to be much higher as often incidents of fraud are under-reported.

The most common types of fraud involve people setting up fake charities to attract donations, common mandate fraud and payment diversions, as well as staff diverting charitable funds into personal bank accounts.

During the pandemic where there have been reduced sign of processes, electronic/remote authorisations, these have provided

greater opportunities for fraudsters to successfully exploit.

How can we prevent fraud?

This is something our clients are increasingly asking. We have seen an appetite for clients to invest in adopting a proactive approach to countering fraud, rather than just responding when fraud is uncovered.

This doesn't mean charities need to make a big investment in resources to prevent against fraud. The key to this investment is being proportionate, looking at what you already have in place and developing a structure/counter fraud strategy, that supports such.

“
We have see an appetite for clients to invest in adopting a proactive approach to countering fraud...

Benefits of a counter fraud strategy

A key benefit of a counter fraud strategy is that it poses an opportunity to assess your areas of business risk that you may have changed in response to the pandemic or

those that are now in place to stay; consider if anything needs strengthening and how any residual/associated risks will be mitigated against. Undertaking a fraud risk assessment is a way to do this.

Once you know the outcomes of your fraud risk assessment, you can make an informed decision and judgement on how to tackle these. They may not all be areas of priority but knowing the risks exist and developing a plan to tackle these is the first step.

Key components

The main components of a counter fraud strategy are:

Culture

It's not just about 'box ticking' with annual awareness training, it's how your counter fraud culture feeds through into your strategic and operational levels of your charity. It's also how you and your colleagues commit to securing the charity's assets from fraudulent abuse. Educate them on the greatest risks, providing examples of what 'tell-tale signs are', where fraud has been uncovered across the sector and importantly, how instances of fraud were prosecuted. This acts as a deterrent but also offers comfort that instances are taken seriously and zero tolerance to such is applied.

Prevention

Have clear, robust, up-to-date and effectively promoted policies and processes in place, to support the strengthening of controls to prevent fraud. These can contribute to the charity setting a consistent tone and message of its investment in a counter fraud culture at a strategic level.

Detection

The Charity Commission reported that two thirds of frauds are identified by financial controls or as part of the charity's audit. Your counter fraud strategy should incorporate a programme of proactive and directed counter fraud testing, with the objective of testing high fraud risk areas and the intention of uncovering fraud if it was happening.

Investigation

Does your charity have a robust fraud response plan in place and trained individuals who can provide experienced and consistent investigation support? These are key questions that may direct future work/tasks to be incorporated into your longer-term counter fraud strategy. How fraud and bribery allegations are reported internally and the outcomes of investigations should be considered.

It's always useful to determine how progress against your strategy will be measured, monitored, and reported upon. Having a timetable when such progress, along with any pre-determined key performance indicators, implementation of any recommendations arising from proactive or reactive work, as well as capturing emerging themes or areas of risk, will all help in affording the charity's Trustees with comfort and visibility of what is happening at an operational/local level.

Ultimately, opportunists are always there and it's everyone's responsibility to be extra vigilant against fraud. Development of a counter fraud strategy is an opportunity to capture a programme of work which reflects the charity's focus, investment and areas of priority it is committing to protect itself.

About the author

Andrea Deegan has worked in the field of fraud prevention and investigation for over 20 years. Her role involves helping a wide range of charities and healthcare organisations develop a proactive approach to fraud prevention through their internal anti-fraud strategies, encompassing Fraud Risk Assessments, awareness activities and directed fraud detection work. Andrea also has responsibility for leading on wide ranging reactive investigations, compliant with overarching regulatory requirements when incidents of fraud are identified.

Get ready for Charity Fraud Awareness Week

Charity Fraud Awareness Week is just around the corner! This year's campaign week will be held between 18-22 October. CFG is partnering once again with the Fraud Advisory Panel to help raise awareness of fraud and cybercrime and how it affects the sector. Look out for the updated Charity Fraud Pledge and get involved! We'll be sharing the new-look website and further details about the campaign online in October.



HMRC issues advice on online fraud

Online scams are widespread and numbers have risen during the past few years. During the past year, HMRC has seen tax-related scams roughly double.

Mike Fell, Head of Cyber Security Operations at HMRC, explains: "These crimes often target the busy, unwary or vulnerable, but anyone can become a victim. The pandemic has given criminals a fresh hook for their activity, and we've detected more than 460 Covid financial support scams alone since early 2020."

Read HMRC's latest advice on protecting yourself from tax-related scams.

Beyond lockdown: Five things to consider



Ben Harris Cert CII
Charity Partnership Manager Endsleigh Insurance Services Ltd

A lot has changed in the last 18 months – for some sectors more than others. In the charity world, traditional methods of raising money were halted, charity shops were forced to shut and the spotlight shone more brightly on the need for charity funding than ever before.

During this time, we supported charities with their vehicle insurance as they’ve adapted their services to aid vaccination transport. And we’ve supported key workers by extending their motor insurance to cover them when driving in locations where their normal policy may not cover them.

Now that we start to welcome more freedom into our lives, and businesses are reopening, what do charities need to consider about the new ‘normal’?

1 Deciding on the future of remote working

We recently wrote about how remote working could bridge your charity’s funding gap. With the future of working from home being discussed so widely recently, the impacts of Covid-19 have seen many employers encouraging a remote (or at least partially-remote) workforce to reap the benefits that come with being home-based.

Whether your organisation is able to function fully with a remote workforce or not, a clear decision, communication and justification to staff/volunteers will be paramount in making sure your charity’s next transition goes as smoothly as possible. It’s highly likely that you’ll need to update your policies, procedures and risk management plans in light of Covid-19 (if you haven’t already!).

If you’re pleased with your staff’s performance whilst working from home, but aren’t sure how they feel about remote working, it can be beneficial to undertake a charity-wide feedback survey to make sure you’re taking everyone’s opinions into account.

- 2 Planning and setting rules for the reopening of charity shops**
- If you’re the owner or manager of a charity shop about to reopen, you’ll need to plan so that you can make sure your shop is as prepared as possible. Some things to think about include:
- Making opening times as clear as you can.
 - Rolling out additional safety measures.
 - Making Covid-19 rules very clear to customers.
 - Training staff on new rules and what to do should a customer not adhere to them.
 - Outline donation rules so those looking to donate know what they can/can’t bring and what they need to do before donating.
 - Outline a risk management plan.
 - Outline a clear process from the point of donation to displaying items on the shop floor.
 - Advertise for new staff/volunteers as early as possible.

3 Getting your vehicles back on the road

If you had to stop your services during the pandemic, you may have found yourself registering your vehicles as off the road (SORN) to save money. If this is the case, before hitting the road again, you’ll need to tax and insure your vehicles, whilst also making sure they are roadworthy and have up to date MOT certificates.

4 Planning for fundraising events

The future of events has been thrown into question this past year, and questions remain. Will they or won’t they take place? Will organisations play it safe and do another year of virtual events, or go ahead with in-person plans?

“*Having a Business Continuity Plan helps you consider emerging risks to your charity and have a plan should a disaster strike.*”

- Whatever you choose to do, a certain and early decision will be key to its success. If you choose to run an in-person event, you’ll need to consider things like:
- Risk management
 - Social distancing design and management
 - Enforcing Covid-19 related rules
 - A backup plan in case government rules change
 - Staff and volunteer numbers
 - Venue capacity vs safe social distancing numbers
- If you decide to keep things virtual, you’ll need to think about things like:
- How reliable is your IT equipment and the platforms you use?
 - Staff and volunteer numbers
 - Equipment for staff and volunteers
 - Enlisting key moderators, participants and speakers
 - What platforms are the most accessible for your audience?
 - A plan for technical difficulties
 - What data will you be collecting and how will this affect your GDPR procedures?

These aren’t exhaustive lists, but you get the idea.

5 Getting a Business Continuity Plan in place

Having a Business Continuity Plan helps you consider emerging risks to your charity and have a plan should a disaster strike. Having one of these plans in place means that charities who do deal with threatening incidents are much better placed to recover than those who don’t.

It can help you develop recovery plans for all kinds of risks and natural disasters including pandemics, cyber risks, extreme weather, service impact and acts of terrorism.

You can read more about [Business Continuity Plans](#) here, where we provide you with lots of useful information for your charity. This includes links to the government’s [downloadable Business Continuity Management Template](#) and going further into the importance of charity insurance within your Business Continuity Plan.



Safeguard your charity

Regardless of whether you’re gearing back up to have a (Covid-safe) office full of staff, are set for remote working for the near future, or are planning to reopen your charity shop, the importance of having charity insurance in place has never been clearer. Protect your charity’s income, fulfil your legal requirements and safeguard your organisation’s future with charity insurance.

EVENTS

We have moved our events online so you can keep access to everything you need at this time. Full access details will be provided upon booking your place. We kindly ask that events payments are made online. If you have any questions about our programme contact events@cfg.org.uk.

FREE EVENTS COMING SOON!

Stop managing and start fixing the latest major attack vector

Wednesday 3 November 12.30-16.00 Online

Microsoft is fast becoming cyberattackers preferred method of gaining unauthorised access to a network or computer system. This event looks to raise awareness of the key risks to organisations, plus how to mitigate them.

This event would be valuable for finance professionals and finance managers with an IT remit in their charity, and trustees concerned with cyber risks.



Date: Monday 11-Thursday 14 October Online

Price: Charity and Individual Member Rate £230, Small Charities £99, Charity and Individual Non-Members £300, CFG Corporate Member £260

Team tickets: Team of Four £560, Team of Five £658, Team of Six £756

The CFG Annual Conference 2021 will empower you as finance teams and charity leaders to feel supported and confident in making the best decisions for your organisation and its culture for long-term strength.

Who should come along to this event? CFG's Annual Conference is ideal for those working in a role that relates to charity finance, from finance directors, CEOs and finance managers to treasurers and trustees, as well as consultants such as senior accountants and charity consultants.

The programme offers sessions for all levels of knowledge, skills and experience.

Team of four, five or six can also book on at a discounted rate – email events@cfg.org.uk to find out more and book your team ticket today.

Small charities can book for a special discount at £99 - email events@cfg.org.uk to book if you're a small charity!

Your CPD: This event could contribute 40 hours to your CPD.

Book now

The CFG Annual Conference 2021 is kindly sponsored by: HSBC, Oracle NetSuite, Sarasin & Partners and SmartSimple.



Date: Beginning this October

Price: Charity and Individual Member Rate £580, Charity and Individual Non-Members £635, CFG Corporate Member £1900

Join us for the next step in your financial leadership journey with our flagship training course!

We're passionate about championing the integral place of the charity finance professional and the role and impact you have within your organisation.

This highly popular course runs as a series of online seminars, in collaboration between Charity Finance Group, Centre for Charity Effectiveness and Sayer Vincent. The course combines the latest leadership models with practical advice and support through interactive sessions, discussions and individual coaching. The sessions will run from 08:30 - 11.00.

View the full programme and Book now

In partnership with the Centre for Charity Effectiveness and Sayer Vincent.



Date: Tuesday 23 November Online

Price: Charity and Individual Members £75, Charity and Individual Non-Members £125, CFG Corporate Member £160

Innovation is most effective when embedded into the working culture and it needs to be considered across every aspect of an organisation. It is also not just about technology but also about people, processes and operations that a charity is undertaking. Innovation does not always require large capital expenditure. Working with other organisations and listening to your stakeholders can be very beneficial and allow you to innovate at a low cost.

At this conference we will discuss the different aspects of innovation and how charities can become pioneering organisations, helping them optimise their impact by utilising the most effective tools and resources.

Join us for a fascinating discussion where we will explore:

- How charities can innovate
- Exploring digital innovation
- Innovating within budget
- Income generation (Case Study)

View the full programme and Book now.

In partnership with Crowe UK.



View full trainings on the CFG website.

Foundation Charity Finance: Wednesday 6 October

In partnership with BDO

Finance for Fundraisers: Thursday 4 November

In partnership with Crowe UK

Audit Committee Training: Wednesday 10 November

In partnership with BDO

Advanced Investment Training: Tuesday 16 November

Kindly sponsored by Sarasin & Partners

Introduction to VAT Training: Wednesday 17 November

In partnership with Goodman Jones

Advanced Charity Finance: Friday 26 November

In partnership with Goodman Jones

Finance for Non-Finance Managers: Wednesday 8 December

In partnership with Bishop Fleming



Date: Tuesday 30 November Online

Price: Charity and Individual Members Free, Charity and Individual Non-Members £85, CFG Corporate Member £185

INGOs are struggling with a plethora of financial challenges, whether that is through increasingly difficult operating environments, government funding cuts, economic instability and quickly changing in-country policies. In order to survive in the post-Covid and post-Brexit world, international organisations need to become more self-sufficient and adapt to the constantly evolving landscape.

This online conference is a valuable space for INGOs to discuss the issues they are facing and ensure they are ready to face a stronger future. Join us for a fascinating discussion where we will explore:

- Grants and funding
- Money transfers
- Travel & security

View the full programme and Book now