

CREATING A BETTER FUTURE

THE 2020 CFG ANNUAL CONFERENCE

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CFG's Chair Gary Forster looks back on the difficulties of the past eight months and how he's making more time to reflect and recuperate.



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COVER STORY:
Annual Conference
2020

CFG’s flagship event of the year is just around the corner. This five-day event can not be missed. Discover who’s speaking, what subjects they’ll be talking about and how to join them.

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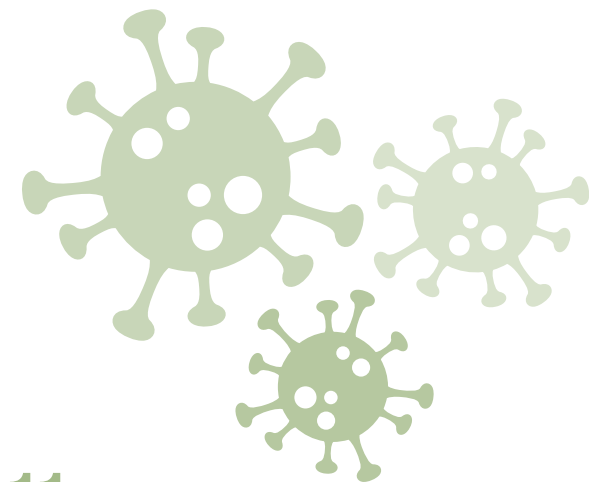
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Standing on shoulders

Welcome to the October
edition of *Finance Focus*!

To describe the past four weeks as a busy time for CFG would be an understatement. September ended with the publication of Danny Kruger’s report *Levelling Up Our Communities*, and the results from our September Charity Tracker survey (October results out soon!). Published within 24 hours of one another, both were clear calls to government to move rapidly to back civil society.

In his report, Mr Kruger stated that no charity has a right to survival but ‘...we risk losing some brilliant and essential organisations if we do not act deliberately and quickly to create a support structure for local communities.’ He then went on to add: ‘If we are to maintain the social sector’s role in the ‘recovery’ phase, more support will be needed.’

Our own #NeverMoreNeeded research, conducted in partnership with Pro Bono Economics and the Chartered Institute of Fundraising, backs up Mr Kruger’s assertions. It highlighted that there has already been a significant number of job losses in the sector, and more were on their way. Just two weeks later, that sadly came to pass.



It’s all too easy to feel bleak. In our sector, we’re constantly mindful of our impact and the difference we make to others. During times of pressure, we likely revert to type and therefore dial up our activity. It’s also all too easy to sacrifice time for ourselves.

On World Mental Health Day a few days ago, we were encouraged to open up, talk and listen, and that’s exactly what Gary Forster, CFG’s Chair, has taken the time to do this month. On page 5, Gary talks about how the past eight months have affected him and how he is making changes to restore some balance.

On page 14, David Fisher of Student Minds shares how his charity is helping to empower students and university communities by rapidly adapting to changing circumstances. One of their approaches is to listen harder.

It’s at times like these that we must strive to see further by standing on the shoulders of giants. In December, we’ll be gathering with many charity finance ‘giants’ to hear how the sector can ‘Create a Better Future’. The 2020 Annual Conference is shaping up to be an unmissable event. To find out who’s speaking, turn to our cover story on page 8.

Finally, October is Black History Month and members of CFG’s new Diversity Working Group and Book Club have been thinking about the black people who have inspired them. Here’s their list. It’s not exhaustive, but it’s incredibly powerful. What strikes me about these people is their sheer determination to be better and do better. It’s through the depth of their convictions, their bold endeavour and often limitless compassion that we can all draw more strength – if we can give ourselves the time and headspace to do it.

I hope you enjoy this edition of *Finance Focus*!

CARON
BRADSHAW
WOMAN OF
THE YEAR!



CFG’s CEO Caron Bradshaw
has been named Woman of the
Year (non-CCAB qualified) at
this year’s Women in Finance
and Accountancy Awards.

Caron fought off strong competition from seven other finalists, including Faye Reizopoulou of Leigh Academies Trust and Julie Teague of Cogent Elliott Group, who were highly commended by the judges.

Presenting the Woman of the Year (non-CCAB) award, Chair of the Judges Kevin Reed said: “Ultimately, our winner best demonstrated her broad range of skills and achievements, backed up by a fascinating external report into her work.”

The judges remarked on Caron’s ‘inspirational story’, impressed that it was ‘very specific as to how this relates to women’. They added that there was clear evidence of how Caron inspires others.

Among those nominating Caron for this year’s award was CFG’s Chair of the Board of Trustees, Gary Forster. He wrote:

‘After ten years of commitment, passion and bloody hard work Caron has built extraordinary momentum for an organisation that not long ago was considered by some just an informal group of well-meaning and passionate professionals.

‘By focusing on a strategy of promoting financial leadership, Caron has cemented CFG as not only a go-to-body for the

sector, but as a promoter of financial excellence throughout all levels of the discipline.’

Commenting on the accolade, Caron said: “When I was studying law one of my lecturers told me never to disclose what I was studying because I would quickly find myself in the corner chatting to the cheese plants and the accountant! So, it is ironic and has always tickled me that I qualified in the legal profession and have spent the time since working with and for accountants, often being mistaken for a member of the profession.

“I have always considered myself an honorary member of the finance world and I am dead chuffed to be awarded ‘Woman of the year (non-CCAB qualified)’ at the Women in Accountancy and Finance Awards. I didn’t set out to make charity finance my calling but it’s so pleasing and gratifying to be recognised in this way.”

“Caron has cemented CFG as not only a go-to-body for the sector, but as a promoter of financial excellence

Three new faces of CFG

CFG is delighted to announce that it has made three new senior appointments. Rui Domingues, Sarah Lomax and Jitesh Mistry have joined the CFG team, bringing with them a wealth of experience and talent.



Rui Domingues has been appointed as CFG’s **Director of Finance and Operations** and leads the finance, HR and ICT teams.

Rui returned to accountancy from civil engineering in the 1990s and since then he hasn’t looked back. Rui is an FCCA and is the current Chair of the CFG’s Technical Accounting Forum and is a member of the ACCA’s Charity Panel.

His career in the not-for-profit sector has taken him to Samaritans, NCT, Disabilities Trust and the General Chiropractic Council.

Commenting on his new role, Rui says: “I’m so glad to have joined CFG as one of the pieces in the planned restructure to the team here.

“I’ve been a supporter – and a beneficiary! – for years of CFG’s work and I’m looking forward to playing my part in inspiring a financially confident, dynamic and trustworthy charity sector.”

Outside of work, with four children aged 16-22 living at home, life is busy for Rui.

He volunteers at his local church, helps with youth work, men’s Bible studies, and occasional preaching. He also does some of the back office work, which you might expect!



Also joining CFG is **Sarah Lomax** who has been appointed as **Director of Commercial Services**. Sarah is responsible

for membership, membership marketing, events, and corporate partnerships.

After graduating from university in Ottawa, Canada, Sarah travelled to the UK where her career took off. She has worked with a range of membership organisations, including the Institute of Physics, the Institute of Marine Engineering, Science and Technology, the Medical Defence Union and the Association of Online Publishers where she was Director of Marketing and Operations.

Sarah’s most recent role was as interim Head of Digital and IT at Shard Financial

Media. Sarah says she is looking forward to ensuring CFG’s products and services to both charity and corporate members are robust and engaging. She is currently working on a number of projects, including CFG’s first fully digital Annual Conference which will be held in December (see page 8).

Sarah comments: “I am very excited to have joined CFG – these are challenging times for nearly everyone in the charity sector, but together we are stronger. We will help and support our members to meet these challenges and continue to provide advice and guidance, and opportunities to learn and grow.”

Outside of working hours, Sarah co-parents two young children with her husband in south east London and enjoys cooking her speciality – Chinese food. She also enjoys swinging and lifting kettlebells and creating pieces of glasswork.



At this critical time charities and their support to the local and wider communities are never more needed.



Last but not least, **Jitesh (Jit) Mistry** joined CFG earlier this month, having spent more than 20 years in the not-for-profit sector.

As **Head of Membership & Marketing**, Jit will be leading the restructured membership team to ensure CFG continues to deliver high-quality services and benefits to members.

Jit’s previous role was Head of Corporate Partnerships, Operations & Membership at The Institute for Turnaround. Jit specialises in developing and implementing strategies to enhance membership engagement and participation.

Commenting on his new role, Jit says: “Helping to support people and organisations to thrive and prosper is at the heart of what I enjoy and I am very excited to have joined the CFG team.”

Jit says he’s keen to hear from CFG members and is looking forward to supporting them across the UK. “At this critical time charities and their support to the local and wider communities are never more needed.”

In his spare time, Jit enjoys playing and organising community football tournaments, developing his culinary and gardening skills and spending time with his wife and five-year-old son.

Pesh Framjee wins prestigious award

Congratulations to CFG’s special advisor **Pesh Framjee** who has been awarded the prestigious ‘**Personality of the Year Award 2020**’ by the **International Accounting Bulletin**.



Pesh is Partner and Global Head of Non-Profits at Crowe and has led the team there since 2008. He is a recognised thought leader, influencer and changemaker and is

well-known for his work supporting the non-profit sector.

Pesh helped establish CFG and he has been involved in many initiatives to improve financial reporting and governance. Currently, he is playing a key role in the IFR4NPO project, which is developing the world’s first international financial reporting guidance for not-for-profit organisations.

Commenting on his award, Pesh said: “It takes a team – the work I do is only possible due to the support of those I work with and from those in the sector I work for.

“Civil society the world over is facing challenging times, there are many new paradigms and it has become self-evident that plans for the future will have to take into account a very different environment from that of the past. The coming years will be challenging, exciting ones for non-profits as they continue to respond to increasing need.”



Civil society the world over is facing challenging times, there are many new paradigms and it has become self-evident that plans for the future will have to take into account a very different environment from that of the past.

Relearning the three Rs



Gary Forster
Chair of the Board of Trustees, CFG,
and CEO, Publish What You Fund

CFG’s Chair, Gary Forster, reflects on a difficult year and how he is managing to look after himself, as well as others, with a renewed focus on the three new Rs: Reflection, recreation, recuperation.

We can all see what’s happening out there; loss of income, redundancies, an inability to provide the range of services we want to provide at a time when they’re so desperately needed.

On top of that, we are trying hard to engage with a government that doesn’t seem to be listening. I don’t think it’s histrionics to say that when we survey the general landscape we find ourselves in the middle of a battle, one that’s been raging for months and has no obvious end in sight.

And when we look closer to home and consider what’s going on in our own organisations, from the restrictions imposed due to the pandemic through to the change in routine and work/life balance, it just gets bloody hard.

I don’t think I’m alone; my sense is that we’re all going through something quite similar, even if we’re not all talking about it.

It has been just a few days since we marked World Mental Health Day. On that day, we were encouraged by Mind and other charities to ‘do one thing’ for better mental health. Ideas ranged from increasing physical exercise and spending time outdoors, to being present and finding ways to learn and give back.

With that in mind, I wanted to open up, share my own experiences, and hopefully encourage you to take time out and focus on yourself for a bit.

The three phases

Looking back over the past six to seven months, I can chart my own mental health journey. It goes something like this:

1. The shock phase

This started with the sheer weirdness of watching Rishi Sunak effectively nationalise the economy when announcing the Job Retention Scheme. This might seem a strange trigger, after all the pandemic was already taking the lives of hundreds, and the government had, in an unprecedented move, advised against non-essential travel a few days earlier. I’d even said goodbye to my team the week before when we’d pre-emptively decided to commence working from home.

But watching on that Friday night, knowing most of the country was watching too, and seeing such a massive intervention from the government just, well, inexplicably, made me wobble. Outwardly, I probably didn’t react in any obvious way, but inwardly something wasn’t right. Soon after, I sent an email to my team saying as much, and making it known that as an organisation we were here to support in any way that we could.

2. The activity phase

Straight after the first phase, I was heading into the second phase of ‘getting busy’, and this probably took me through from April to August. We were setting everyone up with Zoom, making sure people had the right furniture, adapting our operations, installing Slack and other digital tools like Noko and Timetastic to enable satellite working.

It felt like we were dealing with a crisis, and as a CEO I felt like I had a role to play. It was tiring, but it was all a bit new, and different, and there was adrenaline.

Working from home was great and I hadn’t started to miss the face-to-face contact with my team yet. And hey, it was a global pandemic, and we were getting our heads down and getting the job done!

It probably also helped that in my day job we were entering an extremely busy period, preparing for the launch of our flagship research report which only comes out every two years. What better way to tackle your feelings than by burying your head in the sand!

3. The stasis phase

This is where I find myself now. It’s not easy. Let’s call it ‘stasis’. The newness of all of this has worn off. The energy it took to get through phase one and two has gone.

Thankfully, I managed a couple of holidays so was able to recoup some of it. But now it just feels a bit like we’re in flux. I’ve noticed just how much I miss my hour-plus commute as a barrier between work and home life.

On top of that, I’ve recognised that I’ve fallen into this trap where I feel if I’m not doing something I’m just sitting at home. To counter that, I started to fill my days with tasks and calls rather than giving myself time to think things through strategically. If I took a few minutes out to put the washing on, call the bank or mull something over with coffee, I had a strong sense of guilt.

It got worse when I didn’t put in the extra hours, work from the moment I got out of the shower or sat there in the evenings with my laptop half working/half relaxing (often getting nowhere).

Time to reflect

I find it hard to be a CEO and Chair in this new world. As a CEO I’m not able to pick up on those subtle things you’d notice in the office, those behaviours that indicate someone’s not happy about something that you can then address directly without it escalating.

As a Chair, you’re trying to gauge the views of an (albeit great) board by staring at their little boxes on Zoom. And maybe it’s just not getting that direct feedback from people, the smiles to show folks are happy with you and your work, the subtle compliments. It’s all become a bit utilitarian.

They say the hardest step is admitting you have a problem. For me that moment came about six weeks ago, sparked by a recognition that we’re truly in this for the long-term and, frankly, my way of working was unsustainable.

Since then, I’ve started to book things into my week – the odd morning swim so I don’t start work at 7am, an evening run to act as a barrier between work and rest. I’ve been putting more time aside to really think through issues – parking the guilt and sitting away from my laptop for 45 minutes mapping out a problem or opportunity.

I’ve been using the Headspace App, making sure I make the monthly Zoom poker games with my guy friends, reading more. I’ve even gone as far as getting the yoga mat out to try and counter the physical atrophy caused by being in my house all day.

My aim, which I’ve not yet achieved, is to strike a better balance than I’ve had over the past eight months. Getting through this pandemic and likely forthcoming recession was never going to be easy, but it’ll be a hell of a lot harder if I’m burned out mentally and emotionally.

“

They say the hardest step is admitting you have a problem. For me that moment came about six weeks ago, sparked by a recognition that we’re truly in this for the long-term

I know I’m not the first to raise the importance of mental health at this time, and I certainly haven’t provided much advice on what you should do if it’s getting difficult. But this magazine is read by the finance professionals that underpin our sector, that will lead us through this crisis and who will bear much of the brunt of what’s coming.

So, in light of that, I just wanted to say it’s okay not to be okay, and to remind you to take time out to love yourselves as much as you love your causes.

If you would like more information on mental health, visit the NHS website where you will find a handy list of mental health charities, organisations and support groups.

Tiers, tears and Brexit...

Roberta Fusco

Director of Policy & Communications, CFG

As I write, the prime minister had drawn a line under the standoff between the Mayor of Greater Manchester, Andy Burnham, with the announcement that Greater Manchester would move to the ‘Very High’ risk category. This follows the announcement on 12 October of a new Tiers system to classify pandemic risk.

The major point of contention between Greater Manchester’s local leaders and central government was the package of economic support that was on offer to support people and businesses through another effective lockdown. The government has now confirmed it will provide a £60m support package for businesses affected by new coronavirus restrictions in Greater Manchester, though this is not without controversy as it’s short of the £65m that the Mayor of Greater Manchester had said was “the bare minimum to prevent a winter of real hardship”.

Wales and Scotland are pursuing different tactics for dealing with the rise in infection levels and we’re seeing central, local and regional government doing the very opposite of working in harmony and, some saying, exacerbating the danger.

Central to this turmoil is the economic impact on lives and livelihoods that

the handling of the pandemic and implementation of associated measures entails. What this all means for charities and their support of their beneficiaries is an increase in logistical and operational difficulties of trying to navigate services across different levels of restrictions.

With rapidly depleting reserves, increases in demand, and still no further targeted financial support since the very start of the pandemic, the levers on which charities can pull to deliver their missions are rapidly decreasing.

Economic Plan

The government only last week announced changes to the Job Support Scheme to supplement it for areas where businesses are forced to close. However, following much criticism and in a very rapid turn of events, on 22 October 2020, the Chancellor announced yet another raft of changes to the scheme to make it considerably more generous.

Now, from 1 November, the Job Support Scheme for open businesses will mean that employees need now only work a minimum of 20% of their usual hours (rather than 33% under the previous rules) and the employer contribution is now only 5%, with government providing up to 61.67% of wages for hours not worked. Employers will still receive the Job Retention Bonus as previously. This is undoubtedly good news and it’s encouraging to see the government make hasty changes to improve the offer, but it won’t stop redundancies where organisations cannot justify retaining roles long-term due to impact of social distancing.

Alongside changes to the Job Support Scheme, the Chancellor also announced today support for businesses in hospitality, accommodation and leisure up to £2,100 based on rateable value of the property. Local authorities will be responsible for allocating and setting the criteria, which as we saw from the Retail, Hospitality and Leisure Grants earlier this year, can be subject to considerable variation and it’s not yet certain that charities and charitable trusts will be included, though it is hoped to be the case. Another point to note is that charities remain liable to State Aid limits, so this may hamper multi-site charities and businesses claiming . See Richard Sagar’s [latest article](#) for more detail.

Only time will tell if these further restrictions will be effective at reducing transmission rates, although scientific advisors have concerns that the measures announced may not be enough, and whether the Chancellor will see it necessary to yet further revise the package of economic support measures employed alongside.

With the real possibility of negative interest rates looming, it seems to make little economic sense to allow a huge increase in unemployment levels, rather than extend an in-the-long-run cheaper furlough scheme or targeted replacement thereof, which may have been the thinking that prompted today’s latest updates to the scheme.

However, though it is welcomed and it is recognised that the support is much more generous, there are still limitations for many organisations, including charities. With the government having last night voted against the extension of free school meals over the school holidays, the rise in demand for charitable activity to fill the gap between state and private provision is made stark.

Time for action

We are continuing to build support for making the case to government for our Never More Needed Economic Five Point Plan. Our latest charity tracker results, due to be released any day now, show that charities are increasingly concerned about their ability to fundraise over Christmas when the vast majority expect their charity donations to be made. Targeted financial support is needed; two thirds of respondents stated they need additional financial support to deliver their objectives over the coming year, while facing increased demand with fewer resources.

It’s not just frontline service delivery charities who are having to take drastic steps. Our friends at NCVO and IoF have announced redundancies and we stand in continued support of all those organisations who work hard every day to champion the charity sector and deliver for their beneficiaries.

We’ve said it before and we will say it again: Charities are now #NeverMoreNeeded. If civil society is to retain its talent and retain capacity to deliver for its beneficiaries of today and of tomorrow, if the government is serious about ‘levelling up’, especially in a WTO Brexit scenario, then we must now see meaningful engagement and real action from government for our sector and it’s beneficiaries.

Continue to the next page to read Richard Sagar’s update on Brexit.

CAMPAIGNS UPDATE

#NeverMoreNeeded

In the coming weeks we’ll be giving our Five Point Plan another boost with a new, targeted campaign. We invite all charities to throw their support behind the campaign which will urge government to give greater support to the sector. Please keep an eye on our website, social media and the [#NMN campaign](#) site for more details on how to get involved.



#TickTheBox

Our third Gift Aid Awareness Day was another huge success. Thank you for getting involved! We loved seeing all your messages, images and videos. We especially loved seeing how you put your own twist on the campaign.

There were a total of 1,532 tweets and by 10am on 8 October, #GiftAidAwarenessDay and #TickTheBox were trending in twitter’s Top 10! We are also very pleased that more than 80 people attended our live webinar with HMRC and Buzzacott.

Our bespoke [Guide to Gift Aid](#) for CFG members has so been downloaded dozens of times.



A number of MPs also mentioned Gift Aid Awareness Day in the House on the day, including Jacob Rees Mogg who also took the opportunity to remind his colleagues that it was [Octopus Day](#).

On a more serious note, support for our ask as part of the Five Point Plan for a temporary increase in Gift Aid was supported by many MPs including [Alison Thewliss MP](#) who raised it in a [debate](#) in the House of Commons on the day.

#CharityFraudOut

International Charity Fraud Awareness Week got off to a great start, with charities across the globe spreading the word to keep #CharityFraudOut. As Claire Parris from the Charity Commission wrote in last month’s *Finance Focus*, nearly £1m in charity funds was reported lost to fraud and cybercrime. There’s still time to get involved! [Download the campaign pack here](#).

CHARITY FRAUD AWARENESS WEEK
19-23 OCTOBER 2020

Turn to page 11 for Arlene Clapham’s top tips on preventing fraud.



With the unprecedented impact of Covid-19 still front of mind for all parts of the charity sector, it is not surprising that, for many, Brexit has been pushed to the back burner.

“

The government has provided five key actions that all organisations will need to consider

Providing expert advice during uncertain times



 @haysmacintyre



Creating a Better Future

CFG Annual Conference 2020

CFG's Annual Conference 2020 is the charity finance event of the year, where finance teams and leaders from across civil society come together. This winter, the conference theme – **Creating a Better Future** – is more pertinent than ever.

In December, we're bringing you the conference online across five days, so you can fully access all five streams of the conference and tailor the programme to get the most out of the day.

The Annual Conference week will equip you for the future with more than 12 hours of speaker sessions, the space to network with your sector peers and share experiences and support, and seek advice from more than 50 exhibitors.

At a time where nothing has been certain, organisations in the sector have been on a journey of ups, downs, ambiguity and change.

Our aim for the 2020 conference is to instil a new confidence and a fresh perspective in a transforming landscape.

This conference is kindly sponsored by:



Exhibitors

Advanced	M-hance
Auditel	Michael Page
BDO	Moore Kingston Smith
Brewin Dolphin	Morgan Law
Cazenove Charities	Newton Investment Management
Charles Stanley	PEM
Crowe	Pracedo
DE Ford	Quilter Cheviot
Edentree	RSM
Emailage	Saffery Champness
Gallagher	Sayer Vincent
Goodman Masson	Smith & Williamson
Harris Hill	Unit4
Hays	Utility Aid
HSF Healthplan	Waverton
James Hambro & Partners	Workday (previously Adaptive Insights (in2events))
Lake Financial Systems	
Mayfair Capital	
MHA Macintyre Hudson	



Networking time before and during the conference

Specialist advice and support through our sponsor clinics and virtual roundtables

Time to ask your burning questions after every session

Who should join us?

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.

BOOK ONLINE NOW:
cfg.org.uk/ac20
Annual Conference
Monday 7 – Friday 11
December 2020

Connect to CFG's Annual Conference via Whova

To bring you the best conference experience possible, CFG will be launching Whova in November.

Simple to use, the app gives you access to exhibitors and sponsors, opportunities to network with your peers through your own user profile, and the ability to watch all the live sessions seamlessly in one place.

Whova works on mobile devices as well as on desktop so you can access sessions from behind a desk, on the move or on the sofa! Full details will be sent out to delegates in November, so keep your eyes peeled for more information coming soon.

Thanks to the generosity of event sponsors **HSBC**, the CFG Annual Conference will be delivered with **Whova**, a live event conferencing app.

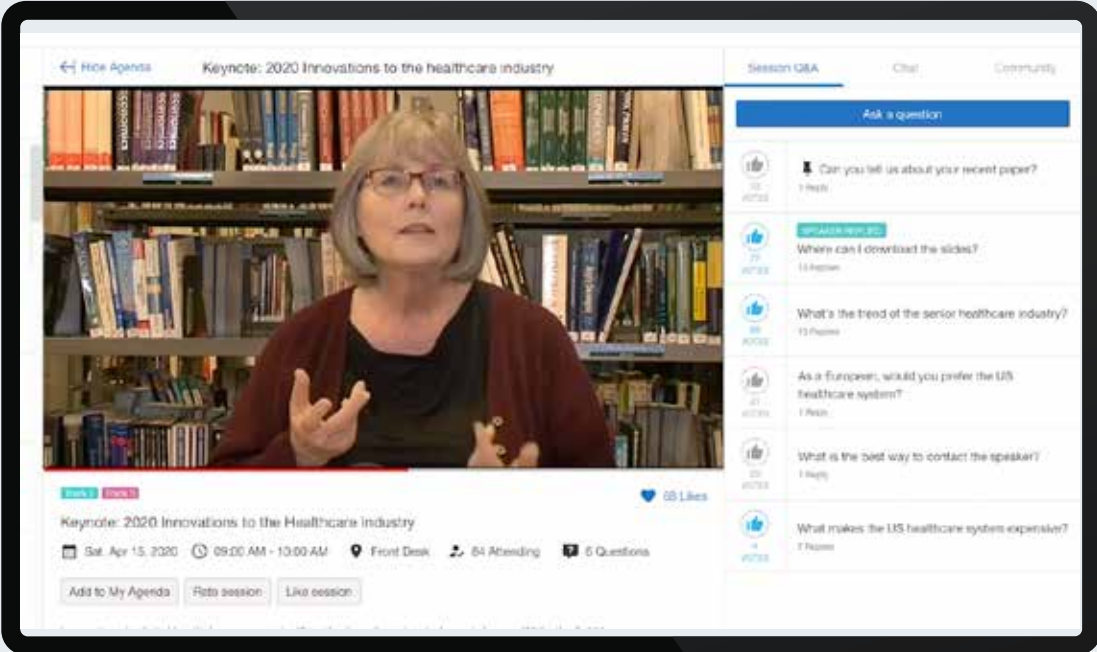


Image shows example content.

Creating a Better Future

CFG Annual Conference 2020



CFG is delighted to announce that the Opening Plenary will be presented by Tessy Ojo CBE.

Tessy is the Chief Executive of the Diana Award, a charity legacy to Diana, Princess of Wales. The charity’s mission is to foster and develop positive change in the lives of young people.

Tessy is an inspirational and creative leader experienced in driving change and redefining outcomes for children and young people through innovative approaches to age old problems. She has more than 20 years’ experience in third sector leadership and in-depth knowledge of working with young people across the world.

In January 2019, Tessy became the very first British National to be honoured with The Prestigious Martin Luther King Award in Atlanta, in recognition of her innovative approach to leadership and humanitarian work. Later that year, Tessy was named by British Airways, as one of the top 100 British Leaders alongside other key notable leaders. Tessy sits on a number of non-Executive boards and has received numerous awards for her work.

CFG looks forward to welcoming Tessy and all our speakers to this year’s conference.

DAY ONE

Monday
7 December 2020

A warm welcome from **Grant Thornton** and **Caron Bradshaw**, CEO, CFG

Opening Plenary
Tessy Ojo CBE, Chief Executive, Diana Award

Size matters: Practical issues dealing with off-payroll workers
Susan Ball, Partner, RSM & **Ben Jones**, Strategic Engagement Lead, HMRC

Workshop: In a world of disruption, what is the future of charities? What does this mean for the finance function?
Hannah Kearthland, Consultant, Hannah Kearthland Limited;
Kevin Waudby, Co-Founder and Partner, Good Innovation & **Ben Holt**, Technology Innovation & Futures Lead, British Red Cross

Writing your charity’s investment policy
Kate Rogers, Co-Head of Charities, Cazenove Charities

Expert update in VAT case law
Socrates Socratous, VAT Partner, Buzzacott

DAY TWO

Tuesday
8 December 2020

What is the future for UK Investors?
Rowena White, Senior Associate Partner and **James Hutton**, Partner, Sarasin & Partners

Working collaboratively with other charities
Nick Waring, Director of Finance & Resources Disasters Emergency Committee

Savings through better procurement
Gillian Gibbon & **Adrian Burton**, Procurement Specialists, Auditel

Reinvention: from Plantagenets to Madonna – remaining relevant to today’s society
Cara Turtington, Partner and Claire Wills, Director, Saffery Champness

“
The CFG Annual Conference is a great opportunity to be among “my people”. I always meet someone interesting, learn something practical and hear something inspiring or challenging

DAY THREE

Wednesday
9 December 2020

Charity Commission: view on financial sustainability, financial governance and trustees’ annual reports
Nigel Davies, Head of Accountancy Services, Charity Commission

Think like a CEO!
Nicki Deeson, Leadership Coach and Business Mentor and **Rob Williams**, CEO, War Child

Improving Productivity
Naziar Hashemi, Partner, National Head of Non Profits, Crowe and **Pesh Framjee**, Head of Non Profits, Crowe

Culture Audit: Could I guess your values after spending a day in your office?
Sarah Hillary, Charities Partner, BDO and **Kami Nuttal**, Culture Specialist, BDO

DAY FOUR

Thursday
10 December 2020

Reserves policy – engaging your board with strategy
with **Helena Wilkinson**, Partner, Head of Charities and NFP, Price Bailey & **Ray Aviyor**, Finance Director, Young Citizens

Grant Thornton’s Charity Top 10 Risks Study: benchmarking the insight
Paul Rao, Director and Head of Charity Internal Audit Practice, Grant Thornton and **Jacky Griffiths**, Associate Director, Business Risk Services, Grant Thornton

Driving change with a new programme for IFRS
Tim Boyes Watson, Humentum & **Paul Winrow**, Technical Partners, MHA MacIntyre Hudson

Benchmarking against the best: surprising pitfalls and best practice
John Robinson, American School in London

DAY FIVE

Friday
11 December 2020

Climate Matters
Rohan Hewavisenti, Chief Financial Officer, Amnesty International and **Adrian Warburton**, Director of Finance, WWF-UK

Business changes – was it skill or was it luck?
Greg Whelan, Deputy Chief Executive, Childhood First



Closing Plenary: Panel Discussion
with **Karl Wilding**, CEO of NCVO; **Nddi Okezie**, CEO of UK Youth; **Rita Chadha**, CEO of Small Charities Coalition. Chaired by **Caron Bradshaw**, CEO, CFG.

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Annual Conference
Monday 7–Friday 11
December 2020

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YEAR'S ANNUAL CONFERENCE



Ray Ayivor
Finance Director, Young
Citizens

Susan Ball
Partner, RSM

Caron Bradshaw
CEO, Charity Finance
Group

Tim Boyes-Watson
Global Director of
Advocacy and Alliances,
Humentum

Adrian Burton
Procurement Specialists,
Auditel

Rita Chadha
CEO, Small Charities
Coalition

Nigel Davies
Head of Accountancy
Services, Charity
Commission

Nicki Deeson
Leadership Coach and
Business Mentor

Pesh Framjee
Head of Non Profits,
Crowe

Gillian Gibbon
Procurement Specialists,
Auditel

Jacky Griffiths
Associate Director,
Business Risk Services,
Grant Thornton

Naziar Hashemi
Partner, National Head
of Non Profits, Crowe

Rohan Hewavisenti
Chief Financial Officer,
Amnesty International

Sarah Hillary
Charities Partner
– Risk & Advisory
Services, BDO

Ben Holt
Technology Innovation
& Futures Lead,
British Red Cross

James Hutton,
Partner at Sarasin &
Partners London

Ben Jones,
Strategic Engagement
Lead, HMRC

Hannah Keartland,
Consultant, Hannah
Keartland Limited

Kami Nuttal
Culture Specialist –
Risk & Advisory
Services, BDO

Tessy Ojo CBE
Chief Executive,
Diana Award

Ndidi Okezie
CEO, UK Youth

Paul Rao
Director and Head of
Charity Internal Audit
Practice, Grant Thornton

John Robinson
Finance Director,
American School
in London

Kate Rogers
Co-Head of Charities,
Cazenove Charities

Philip Satherley
Policy Manager,
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Socrates Socratous
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Cara Turtington
Partner, Saffery
Champnes

Adrian Warburton
Director of Finance,
WWF-UK

Nick Waring
Director of Finance &
Resources, Disasters
Emergency Committee

Greg Whelan
Deputy Chief Executive,
Childhood First

Rowena White
Associate Partner at
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Karl Wilding
CEO, NCVO

Helena Wilkinson
Partner, Head of
Charities and NFP,
Price Bailey

Rob Williams
CEO, War Child

Claire Wills
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Think like
a CEO!



**Nicki Deeson and Rob Williams
set out their stall with an
overview of the session they'll
be facilitating at this year's
Annual Conference...**

How do you feel about being a CEO one day? Whether your answer is 'I'm keen to progress to that role', or 'No way, José!', as finance leaders it's important to understand your CEO's perspective, to maximise your impact and that of your charity.

During this interactive session we will remind ourselves what our finance perspective is of our organisation, and compare it to that of the CEO. You may be surprised to see the size of the overlap, as well as the key differences.

For example, if you are a finance manager one of your roles will be to create a happy and productive team. If you are also responsible for HR then you have a wider remit for all employees – and your CEO will also have an objective of happy and productive staff and volunteers. Do you know where this objective is on your CEO's

priority list? If you don't know, then you can be sure it will be somewhere, and whether it is at the top or the bottom will influence their decisions and actions.

What assumptions are you making about where each area of responsibility is on your



*You will develop actions
to move closer to your
CEO's perspective*

CEO's list? How can you find out if these assumptions are correct? And in the same way that team issues will move up and down your own priority list, depending on the current situation, don't forget your CEO's priorities will change from time to time as well.

During our session, you will develop actions to move closer to your CEO's perspective, bearing in mind what your relationship is like.

Also, Rob will share top tips and the key differences he found when he first took on the top job, based on reflections of his own journey from FD to CEO.

In summary, whether or not you are a budding CEO or a 'No way, José!', please join us. We will have fun, and you will learn how to:

- Think like a CEO and grow your confidence to be one if you want to
- Understand the difference between CEO and FD perspectives
- Be curious and think more strategically and creatively.

The session will necessarily be brief, so please get in touch via email if you have a particular interest in this topic. It would be great to have a conversation outside the session!

Join this session.....

Nicki and Rob will be presenting this session on Day Three, Wednesday 9 December. See the conference programme on the previous page for more information.

Please note that changes may be made to the conference programme at any time. For all the latest information, visit the [Annual Conference page](#) on our website.

The Covid-19 pandemic and the implications for fraud



Arlene Clapham
Risk and Assurance Manager, Sayer Vincent

The global pandemic has had a significant impact on the third sector. The focus for many charities has been to continue delivering services often with fewer resources available.

In some organisations there have been major changes, and some roles that were deemed non-essential for the delivery of services may have been furloughed or roles made redundant in order to safeguard the charity over the longer term. The reduction in resources in the initial period has increased the workload for the staff remaining. One major implication of this is that oversight arrangements and financial controls that were previously in



“
Critique your procedures ensuring that they remain fit for purpose

place may have slipped as capacity is reduced, or may not be being carried out to the same standard. As part of Charity Fraud Awareness Week, we wanted to consider some of the risks and implications for finance teams. In our experience, the uncertain economic impact has led to increased scrutiny of financial information, with cash flow management being critical. While this means that any fraud that does occur may have a bigger impact, it also suggests that fraud is more likely to be detected.

Head to the [Charity Fraud Awareness Hub](#) for more advice and information on how to keep [#CharityFraudOut](#)

FRAUD CASE STUDY

We have set out in the case study below an example of a fraud that occurred during the Covid-19 crisis. We chose this case study as during these times, the availability of key information from business systems (in this case the finance system) and from third parties (in this case the bank) prove vital to effectively review and sense check the validity of transactions.

The issue

The charity was alerted to suspicious activity in its finances by the bank. Initial internal investigations raised suspicions about the conduct of the finance manager as bank transactions included on the bank statements were not traced to the accounting system. Unfortunately, there were no independent oversight arrangements in place for finance and limited challenge over the financial reports by senior management or the trustees, given their increased focus in responding to the crisis.

The process

We obtained all the charity’s bank account and PayPal statements to analyse and assess the legitimacy of transactions that had occurred since the finance manager commenced employment.

The outcome

A number of transactions were identified that were bank transfers from the charity to the finance manager’s personal account. The value of transactions that were diverted to the finance manager’s accounts was quantified.

Lessons learned

Where charity finance teams are small and appropriate segregation of duties is tricky to manage, trust can (mistakenly) be used in the absence of a control. In this case, an individual had too much control and there was not enough oversight activity in place. Senior management have since established accountability for interpreting and challenging financial information to ensure it is consistent with other management information.

TOP TIPS

Here are my top tips for charities to consider to help reduce the risks of fraud during these times.

Risk management discussions are happening much more often with senior management teams and boards. Many organisations have been more focused on ensuring financial sustainability – even those with healthy reserves, preparing scenario plans and assessing the financial impact frequently. This increased focus on the money is in itself a good deterrent for internal fraud.

Critique your procedures ensuring that they remain fit for purpose within the current working environment with the current availability of resource. The sudden switch to homeworking for many charities has impacted their ability to demonstrate compliance with policies and procedures, potentially increasing the possibility of fraud.

Communicate fraud scams to increase the chance that staff will not be caught out by phishing or other scams. Organisations have been congratulated on their ability to switch to home working practices so successfully. However, new remote working arrangements have seen an increase in phishing emails and requests to change supplier details. While these are not new fraud attempts, the changed ways of working can make spotting them more difficult.

Know your people. While everyone has been affected in some way by the pandemic, the scale of the impact is varied. As a general rule, fraud increases at times of economic downturn as people may become more desperate. Remote working also makes it more difficult to pick up on lifestyle changes that would be more obvious under normal circumstances. Many organisations have made a conscious effort to increase the focus on staff wellbeing. Some workers may have more commitments in terms of caring for family members impacting on their ability to give as much time or effort to their roles as before. The impetus on knowing your people and their circumstances allows organisations to assess capacity to follow expected processes preventing and detecting fraud.

Running a smooth remote audit



Fleur Holden
Partner, Sayer Vincent

If charities are planning their audits, accommodating an audit team in the office may not be possible due to current restrictions and social distancing measures.

At Sayer Vincent, we've been running remote audits since lockdown. Here are our tips for a smooth remote audit:

1. Prepare well

Ask your auditor for a checklist of documentation required for the audit. Review it to ensure you can access the information from your current location. If not, plan how the information can be accessed or what alternative information could be used.

Arrange a virtual meeting with your auditor a week ahead to discuss your preparation.

2. Information sharing

Your auditor may provide a digital portal for information sharing. If not, agree how to share information via email or another method. Update your checklist with the status of information provided and reference all documentation to help the auditor identify and locate it.

Co-ordinate information needed from your team and provide your auditor with their contact details for queries.

3. Sample selection as early as possible

Provide accounts and supporting nominal ledger reports one week before the audit so your auditor can work on the detailed transaction reports to select the items they wish to test.

4. Explain what might be different

Some documentation may be with a member of staff who is furloughed, signed copies of documents may only be in paper format and some internal controls may have been adapted to work in remote circumstances. Share this information with your auditor early on rather than waiting for queries or issues to arise.

5. Desktop sharing

Your auditor may need to observe you demonstrating an internal control or accessing information on an electronic banking system. Most video call technologies allow users to share their screen so will be able to simulate the auditor being sat beside you.

6. Working preferences

You may have other commitments to juggle in addition to the audit. Reduce pressure by letting the auditor know your working hours and when to contact you.

7. Regular communication and virtual meetings

Communication is key. Your auditor can invite you to video calls even if you don't have the software. Consider who they need to speak to in the finance team and beyond and provide their contact details. Your auditor will also be happy to attend the finance committee or board meetings remotely too.

8. Regular update reports

Usually, an auditor will provide a report each week detailing outstanding information. Working remotely, you may wish for more regular updates. Let your auditor know if you want an outstanding list each day.

9. Manager review

Auditor visits to review work can also be done remotely, with the audit manager reviewing the work before arranging a virtual meeting to discuss any findings.

10. Audit work that cannot be done

Some audit work may not be possible without access to the office, where evidence is only in hard copy. Your auditor will use alternative evidence wherever possible, but you may need to agree a list of information to be provided later.

With careful planning, a good check list and the right technology, there is no reason why a remote audit can't be as smooth as a face to face one.

“
Arrange a virtual meeting with your auditor a week ahead to discuss your preparation.”



Never stop learning

Rui Domingues
Director of Finance & Operations, CFG

The pandemic has forced us to focus on how we work, so it’s as important as it ever was to take time to reflect on our team’s learning needs, both for their development and to meet your charity’s needs.

The return to school and university may have got off to a stutter, thanks to Covid-19 and new restrictions, but it’s still that time of year when our thoughts turn to learning and development. After seven months of adapting to working remotely, it’s a good time to reflect and ask ourselves:

- What skills do we need to ensure our organisation can cope with the challenges ahead?
- What does an effective finance function now look like?
- Are there new training and professional development gaps we need to spot and how can we fill them?

Let’s face it, when you’re looking at saving money in the current environment, the training budget is one of the first to come under the spotlight. But investing so that you have the right skills and knowledge in your team has never been more important.

The Finance Journey

As a model to come up with plans, I like The Finance Journey. It lays out a development structure that can be used for individuals and whole teams. It’s a framework which can be used to set plans for personal growth that supports the charity; helping individuals and teams to journey from purely processing transactions, all the way through to being transformative in your organisation.

The base levels of the model (Processing, Controlling, Reporting, and Analysing) have probably been the most challenged with our recent move to working more from home. Expenses are being processed online, invoices are coming in electronically, reports have to be produced remotely; access to data is harder. But have you assessed what training or support your finance team might need to operate these processes?

Investing in either time or courses for your team to thoroughly understand these new systems will pay dividends in terms of better control of those activities.



“
Digital skills in these more traditional areas of finance will become more and more important”

Digital skills in these more traditional areas of finance will become more and more important as the recent changes bed into a new way of working. It might not be unrecognisable from how it used to be, but it will undoubtedly be different. Digital skills like agile project delivery, data literacy and data security/protection awareness will need to be invested in.

Coaching

The fundamental skills that you need in a finance team haven’t changed. Focusing on the detail, analysing data, communicating information, and sector-specific technical knowledge are the bedrock of any finance team and need to be developed and kept up-to-date. Those skills still need to be used in a Covid-affected world, as well as during more normal times.

Sector-specific skills can be updated through our CFG courses and events. (Other providers are, of course, available, but please forgive me for plugging ours!)

These can be an invaluable way of keeping your CPD up-to-date.

Alongside courses and events, coaching your team is a cost-effective way to develop individuals in some of the fundamental skills. Investing your time in setting and monitoring individual improvement plans (maybe using something like the G.R.O.W. coaching model) can help improve performance in these more essential areas.

In conclusion, there are low cost options out there to keep improving the effectiveness of your finance function. Finding a model to help provide structure to your team’s improvement plan will help. And finance functions will need to keep improving to help our organisations through this period.

Cutting back on investing in training and development is likely to increase your risks at this turbulent time. Investing, on the other hand, will lead to a team that’s better prepared to meet the challenges that lie ahead.



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Student Minds

David Fisher
Finance Lead



Student Minds is the UK’s student mental health charity, working with students, service users, professionals and academics to develop new ways to empower students and improve their mental health. *Finance Focus* talks to David Fisher about how the charity has grown and what’s next on the horizon.



► Please tell us about Student Minds and what sets you apart from other similar charities or organisations?

Student Minds is the UK’s student mental health charity. We empower students and members of the university community to look after their own mental health, support others and create change. We passionately believe students can change the world and work hard to ensure the student voice influences decisions that affect student mental health.

► What have been your charity’s biggest achievements/ highlights in recent years?

We’re a relatively new organisation and have grown rapidly, from a volunteer-led support group in 2009 to a one-staff-member charity in 2012 and a £3m turnover in 2020. A real highlight for us in recent years has been leading on the creation of the ‘University Mental Health Charter’- a good practice guide for a whole-university approach to mental health. Developing the Charter has been an inspiring journey, a highlight of which was sending the entire team on a roadshow to universities across the country, gathering input from thousands of students and university staff. We published the Charter in late 2019 and will be launching a national quality mark in 2021.



► What is the biggest issue(s) facing your charity right now and how are you responding?

It has to be the Covid-19 pandemic, which is having a huge impact on students and university communities. Early on we had to pause all of our in-person activities – and it would have been tempting to rush to adapt our existing work to digital channels. Instead we took the decision to ramp up our ‘insight’ work, expanding our capacity to listen to and understand the needs of students and universities right now. This has been invaluable as it turns out the pandemic situation is both ongoing and fast-changing, and our new ‘insight’ channels are helping us respond to this week’s situation, not last week’s. We have also worked hard to amplify our voice to government, to communicate student needs (given that the pandemic has exaggerated existing challenges for students) and hopefully influence the government response.

► What opportunities or new initiatives have come out of the pandemic?

In response to the pandemic we’ve led the development of ‘Student Space’, a web resource to support students through coronavirus. Students are able to explore online resources, access direct support services via text, phone, email and webchat and navigate what support is available to them at their university using our university support directory. Providing a digital service direct to students on a national scale is a new approach for us and we’ve had to mobilise quickly. Using our insights work the resource is continually developing to meet emerging student needs. Alongside this we are rising to the challenge of digital transformation for other our projects and the organisation. There’s a lot of change all at once and we’re having to reforecast our budgets almost continually!

► What sort of support have you gained from CFG membership? What are the benefits of being part of the CFG community?

In a busy finance role in a rapidly changing organisation it’s sometimes hard to keep abreast of relevant regulations and ‘good practice’ thinking. CFG really helps me with the ‘unknown unknowns’ – things I should be thinking about but haven’t yet clocked! Finance Focus magazine and the Members meetings are great for this. Also, being the sole finance person in an organisation can occasionally be lonely, so it’s nice to connect with others in the same field.

► What is the one resource or technology your organisation could not do without?

We use Slack for internal communications within the team and keep emails mainly for external communication. I was dubious about Slack at first but I’m a complete convert! Now that we are all home-working, we’re finding that Slack can help recreate some of the dynamics of working in a shared physical space. It’s a good channel for the more informal or shared conversations that are hard to replicate via email.

► Looking to the future, what keeps you awake at night? What excites you?

As an organisation that has grown quickly both in scale and diversity of work, it’s been a challenge to grow our infrastructure to match – things like finance, governance, HR, IT. As a finance person, this is a very ‘present’ challenge, but it does excite me – the opportunity to help shape a strong organisation which will be here to meet the needs of the future.



EVENTS

We have moved our events online while we adjust to the conditions created by Covid-19. Full access details will be provided upon booking your place. If you have any questions about our events and training programme in the meantime do get in touch with our team at events@cfg.org.uk.



Dates: Tuesday 19 January; Thursday 21 January; Tuesday 26 January and Thursday 28 January.

Where: Online, Zoom

Cost: Member rate: £65 Non-member rate £86

CFG's popular Risk Conference covers the full scope of risk management in the non-profit sector, from exploring reputational risk to practical workshops, helping you and your organisation to develop understanding and knowledge, be responsive, and support robust decision-making processes.

Attendees can choose to attend individual days or all four days of the conference. Members can also book three days for the price of four – to take advantage of the four day offer email events@cfg.org.uk

For full booking details and the four day offer email: events@cfg.org.uk.
To view all the Risk events visit the CFG website.

Day one: Risk propensity and management

The first day in our Risk 2021 programme explores your organisation's risk propensity at board level, the role of reserves in responding to a crisis, and takes a practical look at effective risk management in an interactive workshop. [Book](#)

Day two: Regulatory and practical risks

The theme of the second day in our Risk 2021 series is regulatory and practical risks. We'll be joined by Alzheimer's Society CEO Kate Lee who explores reputation risk; Head of Fraud Advisory Panel Mia Campbell will be taking you through the fraud landscape, and specialists Joanna Blackman and Claris D'cruz from Wrigleys Solicitors will be running a workshop on safeguarding. [Book](#)

Day three: Ongoing risks

The theme of the third day in our series of Risk 2021 events is ongoing risks. This morning programme will cover the vital topic of cyber security and data protection, and will explore how to enhance productivity and wellbeing in your team in a working from home environment. This event will also look at how you can work on creating an inclusive culture in your organisation. [Book](#)

Day four: Dealing with a crisis

The final day in our series of Risk 2021 events will unlock the importance of a proactive risk reporting approach with an exploration of risk reporting systems and performance indicators. Sessions will also cover the impact of Covid on insurance policies, and take a practical look at crisis management and disaster recovery with an interactive workshop. [Book](#)



IFR4NPO AWARENESS MEETING

Date: Friday 13 November, 10am-12pm

Where: Online

Cost: Free to attend

CFG is proud to be the UK Country Champion for the IFR4NPO project, an initiative to develop internationally applicable financial reporting guidance for non profit organisations (NPOs), to improving accountability, consistency, transparency and trust. Learn more about this project and how to participate in the consultation process in 2021.

Hear from Samantha Musoke IFR4NPO Project Director; Tim Boyes-Watson, Global Director of Alliances and Advocacy at Humentum, and Pesh Framjee, Global Head of Non Profits at Crowe and a member of the IFR4NPO Practitioner Advisory Group.

For more information and bookings:
www.cfg.org.uk/IFR4NPOAwarenessMeeting



Date: Friday 6 November

Where: Online course

Cost: Free to attend

All charities need to monitor their governance and risk. Some do this through their trustee body, and some through committees like 'finance and general purposes'.

Increasingly, charities are also establishing separate audit committees to help in their governance processes, but there is no established framework for them in the charity sector.

This course introduces the main functions of audit committees and discusses their role in charities. It is a combination of presented material and discussion time.

Who should attend: Finance Directors, senior management, committee members, treasurers, trustees, from charities both with or without audit committees.

Full programme and bookings:
www.cfg.org.uk/Auditcommittee

NEW SPECIAL INTEREST GROUP DATES – FREE AND ONLINE

ART SIG

Date: Thursday 5 November

CFG's new Arts group, established to support our many members who work within this sector, is a community and forum for finance professionals in the arts to connect with peers, share expertise and shape CFG's policy work. [Book](#)

OVERSEAS SIG

Date: Thursday 12 November

You will hear about the changes which INGOs have introduced to their finance, risk management and compliance processes in relation to country operations, in light of the range of pandemic restrictions and implications they have faced so far. [Book](#)

FINANCE IN GRANTMAKING

Date: Monday 16 November

You'll be exploring the current grantmaking landscape in response to Covid-19 and the dynamic approaches being adopted by funders. You will also hear from first hand experiences of how an organisation developed their approach to Equality, Diversity and Inclusion and the impact this has had on staff and beneficiaries. [Book](#)



FOUNDATION AND ADVANCED CHARITY FINANCE TRAINING

This popular one day introductory course is aimed at people who are comfortable with finance matters, and concentrates on what is different in the world of charity finance.

Wednesday 24 March
www.cfg.org.uk/FoundationCharityFinanceMar

Wednesday 14 July
www.cfg.org.uk/FoundationCharityFinanceJuly

ADVANCED CHARITY FINANCE TRAINING

This course is aimed at charity finance professionals with experience of working in the sector and builds on the knowledge gained in the Introduction to Charity Finance course.

Wednesday 21 April
www.cfg.org.uk/AdvancedCharityFinanceApr

Wednesday 16 June
www.cfg.org.uk/AdvancedCharityFinanceJune

In partnership with BDO