

The ACCA logo is a red square with the letters 'ACCA' in white, bold, sans-serif font. The background of the entire page is a low-angle photograph of a modern glass skyscraper against a blue sky with light clouds. A thin red line runs horizontally across the top and vertically down the right side of the page, framing the content.

ACCA

ACCA Charity Finance Conference 2017

Tuesday 10 October
Jurys Inn, Birmingham

Think Ahead



The details

The speakers

ACCA's annual charity finance returns for 2017, providing you with an excellent opportunity to keep up-to-date with the latest developments and best practice within the sector. You can also benefit from networking with like-minded professionals outside the office environment.

Date: Tuesday 10 October 2017

Time: 09.30 –17.00

Venue: Jurys Inn, Birmingham
245 Broad Street
Birmingham
B1 2HQ

Fee: £263

EARLY BOOKING DISCOUNT
Save £20 when you book on or before 15 September 2017 and pay just £243 per delegate

CPD Units: 8

Who should attend?

Finance professionals working in or advising charities, trustees and treasurers. The conference is also a useful refresher for those who only deal with charities occasionally.

What will I get out of it?

- An update on recent important developments in the charity sector
- guidance on best practice
- an opportunity to exchange your views and experiences with other professionals working in the same field.

Nigel Davies BA (Hons) CPFA DChA ACCA

Head of Accountancy Services, Charity Commission

Bill Lewis

Consultant, Bates Wells Braithwaite LLP

Rory O'Carroll

Partner, Beever and Struthers

Kate Sayer

Senior Consultant, Sayer Vincent

Michael Tourville

Assistant Director, Beever and Struthers

Peter Woodhouse

Employment Partner, Stone King LLP

To register and book online please visit <https://events.accaglobal.com>

The programme

Chairman's details

09:00–09:30	Registration with refreshments
09:30 – 09:40	Chairman's Welcome Richard Martin
09:40 – 10:30	Good governance matters – how to avoid reputation damage Kate Sayer
10:30 – 11:30	Financial Reporting Update Rory O'Carroll and Michael Tourville, Beever Struthers
11:30 – 11:45	Refreshment break
11:45 – 12:45	Charity Tax and VAT in the Last 12 Months Bill Lewis
12:45 – 13:30	Lunch
13:30 – 14:30	Developments in regulation and Charity Commission guidance featuring Q&A panel discussion Chaired by Nigel Davies
14:30 – 15:30	GDPR – What are the charity's obligations? Speaker TBC
15:30 – 15:45	Refreshment break
15:45 – 16:45	Charity People: Latest changes in rules for employers and volunteers Peter Woodhouse
16:45 – 17:00	Chair's Closing Remarks
17:00	Close

Richard Martin is head of corporate reporting at ACCA. He is responsible for monitoring developments in integrated and narrative reporting, financial reporting, analysing the impact of changes and developing ACCA's policy on these issues. He speaks regularly on accounting standards internationally and in the UK. He is a member of the Accounting Working Party of Accountancy Europe and of their Corporate Reporting Policy Group. He is chairman of the Accounting Expert Group at Accountancy Europe. Richard is also a member of the accounting and reporting group of experts at the United Nations Conference on Trade & Development (UNCTAD), particularly involved with developing their reporting guidelines for small and medium-sized businesses.

Session details

Good Governance Matters – How to Avoid Reputational Damage

Kate Sayer

After a number of high profile scandals, charities have welcomed the new edition of the governance code. As well as providing guidance, the code sets a benchmark by which boards can judge their performance. With an edition for small charities as well as one for larger charities, the code is relevant to all charities. This session will pick out highlights and provide an overview. Our speaker will draw on her experience of managing reputational risk to provide further insight to this important subject.

Financial Reporting Update

Rory O'Carroll and Michael Tourville

This session will ensure you are up to date with important developments from the past year and those upcoming. It will look at key issues that have arisen from the application of FRS102 and the SORP.

Charity Tax and VAT in the last 12 months

Bill Lewis

In this session, the speaker will be covering the latest updates and changes to tax and VAT in the last 12 months, including the following key areas:

- Brexit – a Charity VAT opportunity?
- Gift Aid Small Donations Scheme – new rules effective from April 2017
- IR35 – new rules for public sector – likelihood they will be expanded to the charity and wider sector
- Tax and VAT caselaw update – identifying the developments here that could benefit or hinder charities.

Developments in Regulation and Charity Commission Guidance featuring Q&A Panel Discussion

Chaired by Nigel Davies

In the first part of this session, Nigel Davies will be reviewing the new requirements for reporting to the regulator, new guidance on independent examination and the reporting of serious incidents by trustees. He will also recap on the Commission's regulatory priorities and signpost new or updated guidance issued in the past year.

In the second part of this session, Nigel and his fellow speakers will open the floor to your questions. Delegates are also welcome to submit questions in advance of attending, or throughout the day, which will give Nigel and the panel time to prepare more detailed answers to any complex queries.

GDPR – What are the Charity's Obligations?

Speaker TBC

The new General Data Protection Regulation (GDPR) is set to come into force in the UK from 25 May 2018. This session will focus on the key changes coming into place and how these changes will affect your charity. This session will also cover what you should be doing to ensure your charity is GDPR ready.

Charity People – Latest Changes in Rules for Employers and Volunteers

Peter Woodhouse

The speaker will look at how employment law governs the status of charity volunteers, their rights, the key risks and, using examples from his own practice, how to mitigate those risks.

The speaker will also discuss how to identify who is the legal employer in common charity structures and the proper decision maker for the purpose of taking employment decisions, and why this is important. This section will include consideration of whether there is a right to make employee severance payments, and how such payments might be implemented.

Finally, he will review recent employment law developments affecting the charity sector.

To register and book online please visit <https://events.accaglobal.com>

Speaker biographies

Nigel Davies

Nigel Davies is a qualified accountant and he joined the Commission in 2001. Since 2014 Nigel is Head of Accountancy Services at the Charity Commission and also Joint Chair of the Charities SORP Committee.

Nigel oversees the work of the team of accountants who cover all accountancy aspects of operational and inquiry activities for the Commission. He leads for the Commission on accountancy related collaborations with umbrella organisations, professional accountancy institutes, technical panels and working parties. He regularly speaks at events and conferences on charity accounting issues and publishes articles on charity accountancy matters.

Bill Lewis

Bill Lewis is a tax consultant at Bates Wells Braithwaite, a leading charity law firm. He has nearly 30 years' experience advising on all aspects of taxation affecting charities, including VAT, PAYE and corporation tax.

Bill has worked for a number of high-profile organisations including the Inland Revenue, PricewaterhouseCoopers, and Scope, and is a tax advisor to The Prostate Cancer Charity.

Rory O'Carroll

Rory is a partner in Beever and Struthers' London office who leads assurance services for internal and external audits as well as specialist assignments, including lean process reviews and service charge services on a range of clients from 5,000 units to smaller specialised charities. He is responsible for the development of Beever and Struthers' systems approach to service charge examinations and is responsible for issuing over 30,000 certificates a year.

He is a past finance director in financial services and has held senior positions within the housing sector and has extensive experience of treasury, risk management, development appraisal and programme control and business planning.

Kate Sayer

Kate has specialised in charities for over 30 years, acting as auditor, advisor, facilitator and trainer to a wide range of charities and not-for-profit organisations. She provides consulting services on governance, risk management, structural change, organisational development, mergers and start-ups. She is the author of a number of charity finance guides and lectures part-time on the masters course in charity finance at Cass Business School.

Kate is also the treasurer and a trustee of the Association of Chairs, who were on the steering group for the Charity Governance Code published in July this year.

Michael Tourville

Michael joined Beever and Struthers in 2008, having graduated from Imperial College London and has over 8 years audit experience with clients in the public, not for profit and charity sectors. Michael previously worked at a London RP and was responsible for rent accounting and purchase ledger functions.

Michael has been awarded the Audit Qualification and "Responsible Individual" status by the Institute of Chartered Accountants in England and Wales.

Peter Woodhouse

Peter is a partner in the employment team at Stone King LLP and he has been assisting clients in employment matters since he qualified in 1991. He advises on a full range of employment matters and aims to provide support to charities managing change in their organisations. He works with clients to identify risk and offer solutions within their level of risk tolerance.

He is qualified as a solicitor and barrister and was the first (and is believed to have been the only) solicitor listed in the government's panel of Treasury Counsel. Peter has acted for a wide range of clients over the years including being directly instructed by the Treasury Solicitors for public bodies including the Courts Service, Customs and Excise and the MOD. He has appeared over 500 hundred times in the Employment Tribunal and has taken cases up to the Court of Appeal. He is noted as a quality advocate and has been listed in the Lawyers' Magazine Hot 100 of legal professionals.

Booking form

ACCA CHARITY FINANCE CONFERENCE 2017

Please visit: <https://events.accaglobal.com> to register and book online.
Alternatively, please complete the booking form using BLOCK CAPITALS throughout.
If you wish to book more than one delegate, please photocopy this form.

Please book a place on the ACCA Charity Finance Conference 2017

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