

# Kingston Smith at CHASE 2010

Seminar programme and surgeries



Who should attend:

**Chief Executives, Finance Directors,  
Directors of Fundraising and Trustees**

**Our seminars at CHASE 2010 are designed to provide an in-depth analysis of areas relevant to charities. Our team of experts will cover topics ranging from governance issues through to fundraising and finance matters. In addition to our seminars, we will run free surgeries allowing you to discuss those topics that are keeping you awake at night. Our surgeries focus on the following areas:**

- **Fundraising and management**
- **Human resources**
- **Risk and crisis management**
- **Good governance**
- **Audit, accounting and tax**

**To book your place call our events line on 020 7566 3850.**

## **Day 1** February 23rd 2010

### Trustee stream

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#### **Charity mergers for the uninitiated**

**Speaker: Anne-Marie Piper, Farrer & Co**

Anne-Marie Piper of law firm Farrer & Co and a recognised leader in the field of charity mergers will provide an overview for trustees on the whole process of merging charities – who does what, why and when.

#### **Governance in practice**

**Sandra de Lord, Kingston Smith**

Do you worry about the responsibilities facing you as a member of the trustee board? If you work for a charity, do you understand what the trustee board does and how they can support you? This session explores key aspects of good governance practice and provides practical advice to support sound management.

#### **Are you too reserved? A seminar on reserves policies**

**Speakers: Nick Brooks, Kingston Smith**

This seminar will look at reserves policies in light of the new advice published by the Charity Commission. It will also cover the factors you should consider in formulating your policy.

#### **Risk management: why it fails and how to get it right**

**Speaker: Mark Child and David Morrey, Kingston Smith Consulting**

It is easy to comply and go beyond Charity Commission guidance on risk management and yet still suffer a serious loss you should have avoided. We examine why risk management fails and the things every organisation should do to get it right.

### Fundraising stream

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#### **Fundraising for capital appeals**

**Speaker: Jane Hellings, Kingston Smith Fundraising & Management**

This seminar will provide practical steps to developing a fundraising strategy for capital projects. Topics will include developing a case for support, voluntary leadership and how to work with your board, appeal management and donor cultivation.

## **Day 2** February 24th 2010

### Finance stream

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#### **Taking the credit**

**Speaker: Tim Wright, Kingston Smith Consulting**

Any organisation which accepts credit or debit cards must comply with the Payment Card Industry's Data Security Standard. The session will cover what this means, including an overview of the 12 requirements of the Standard and how you should comply.

#### **Successful finance outsourcing**

**Speaker: Ashley Whittaker, Kingston Smith Association Management**

Ashley Whittaker is CEO of the outsourcing division of Kingston Smith LLP, which provides accounting, membership, event and company secretarial support to 38 not for profit clients. With decades of experience in the outsourcing sector, Ashley will discuss what makes a good outsourcing deal and the do's and don'ts of outsourcing.

To book your place on any of these seminars and surgeries please visit [www.chase2010.org.uk](http://www.chase2010.org.uk)

## Day 2 February 24th 2010

### Fundraising stream

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#### **Gift Aid – Maximising the returns and avoiding pitfalls**

**Speaker: Tenika Ah-Wan, Kingston Smith Fundraising & Management and David Hadley, Kingston Smith**

This seminar will help maximise Gift Aid receipts, by obtaining Gift Aid on donated goods, entrance fees and membership subscriptions. It will consider traps to be avoided on volunteers' expenses, charity auctions and adventure fundraising events. There will also be hints and tips to help survive the Gift Aid audit.

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#### **Utilising fundraising volunteers (workshop)**

**Speaker: Tenika Ah-Wan, Kingston Smith Fundraising & Management**

Fundraising volunteers are an asset to any organisation's development. To be effective and to remain loyal to your organisation, volunteers must be chosen well, placed with imagination, given satisfying work which matches their skills and interests, and managed with skill. This workshop unpacks all of these issues and will provide practical guidance on how to utilise fundraising volunteers more effectively.

### HR stream

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#### **Dealing with discipline and grievances within the new ACAS guidelines**

**Speaker: Rayna Kutner, HR Insight**

This seminar will outline how to deal effectively with grievances and discipline issues in light of the repeal of statutory procedures. We will also cover what is a fair process now that the ACAS guidelines apply.

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#### **Carrots and sticks – Managing performance effectively**

**Speaker: Murray Meeuwis, HR Insight**

This session looks at the importance of managing performance effectively at senior levels in the Charity sector. We will also explore how to develop a strategy, set goals and deal with poor performance.

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#### **Fairytale fundraising strategies (workshop)**

**Speaker: Tenika Ah-Wan, Kingston Smith Fundraising & Management**

This interactive 'Quest' fairytale workshop session will chart the course for developing your Fundraising Strategy, covering everything from setting the mission to selecting the right people to develop the strategy. By considering the tools and information you need as well as preparing for the pitfalls and opposition you may encounter. You will have a clear understanding of the key components needed to produce your fairytale Fundraising Strategy.

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#### **You've got them, try to keep them – How to retain and motivate your key people**

**Speaker: Roger Cook, Blacktower Financial Advisers**

Most organisations, large and small, will readily subscribe to the theory that people are their most valuable assets. They recognise that by retaining their key individuals, they will enjoy greater success than those who adopt a more revolving door policy. In the session we will look at ways in which employee benefit programmes can be successfully used to help retain and motivate employees.

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#### **To employ or not to employ – When a volunteer becomes an employee**

**Speaker: Joanna Cowie, HR Insight**

Drawing the fine legal line between when a volunteer becomes an employee and what to do when this occurs by "stealth". This seminar will cover the legal tests for employment and the subsequent consequences for disputes, contracts and claims.

To book your place on any of these seminars and surgeries please visit [www.chase2010.org.uk](http://www.chase2010.org.uk)

## Helping you help others

At Kingston Smith LLP, we take a different approach to client relationships. Our philosophy is simple: we want all our clients to succeed. We work with organisations of all sizes across all sectors, helping them deal with operational, development and management issues.

Our not for profit group takes the time to ensure they have a deep understanding of our clients' needs, co-ordinating and tailoring our wide range of specialist services so that you get the right advice at the right time for your organisation's goals.

Kingston Smith not for profit group consists of 6 dedicated divisions that can advise on the following issues:

### Fundraising

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- Feasibility studies and appeal support (capital and revenue)
- Fundraising strategies and implementation
- Trust, statutory and lottery research and applications
- Major gift fundraising
- Fundraising Audit

### Governance and Risk Management

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- Board effectiveness reviews
- Risk management
- Board and staff development, mentoring and training
- Organisational reviews, strategy and planning
- Internal audit
- Information security and data protection
- Business continuity management
- Third party due diligence

### Technology

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- IT strategy and health checks
- Supplier and system selection
- IT security and data privacy
- System and network performance

### Administration Outsourcing

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- Helping you streamline your operations, freeing administrative time up and enabling you to focus on your prime objectives
- Offering assistance on major events, donor care, membership and subscription renewals

### Auditing

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- Audit and accountancy
- Financial reporting
- Taxation
- VAT
- Regulatory compliance

### Human Resources and Recruitment

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- Assistance in all areas of human resources management, and up to date knowledge of employment law
- Review of contracts of employment
- Help with tribunals
- Recruitment
- Salary reviews
- Employee benefits

### Kingston Smith at CHASE 2010

**Kingston Smith LLP is delighted to be the lead sponsor of CHASE 2010. Visit us at stand 16, February 23rd & 24th.**

### Contact us

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