



Charitable funds finance

12 November 2019, 110 Rochester Row



Event overview

Charitable funds are a key area of NHS finance so it is essential that all those involved keep up to date with any changes to practices and procedures.

This year's programme includes the opportunity to hear from the Charity Commission, the Office of Scottish Charity Regulator and the Fundraising Regulator.

There will also be a range of workshops focusing on areas NHS charities are currently grappling with.

Programme

09:15 Registration and coffee

09:45 **Chairman's opening remarks** - *Ken Godber, Chairman, HFMA Charitable Funds Special Interest Group*

09:50 **Keynote address** - *Ellie Orton, CEO, NHS Charities Together*

10:50 **Charity Commission update** – an overview of developments at the Regulator

Nigel Davies, Head of Accountancy Services, Charity Commission

11:20 Coffee

11:35 **Office of Scottish Charity Regulator** – an NHS case study, Tayside Health Board

Martin Tyson, Head of Casework, OSCR

12:05 Workshop session one

13:00 Lunch

13:45 Workshop session two

14:40 Coffee

15:00 Meeting the fundraising standards and reporting requirements

Priya Warner, Head of Policy, Fundraising Regulator

The Code of Fundraising Practice sets the standards that apply to fundraising carried out by all charitable institutions and third party fundraisers in the UK. The new and improved code came into effect in October 2019.

Join the Fundraising Regulator to learn which standards apply to NHS charitable funds and understand other key areas including tips for charity reporting.

15.45 Feedback session – to share learning from the day's workshop sessions and help inform the future work programme of the HFMA Charitable Funds Special Interest Group.

16:00 Close

Workshop sessions

1A Impact reporting

NHS charities are used to reporting what money has been spent on, this session will consider the next step which is to report the impact that that spending has had

Keith Brooks, Charity Director, Northamptonshire Health Charity

1B Introduction to charity regulation

For those who are new to the charity sector, this session will consider the role of the Charity Commission as regulator as well as how the SORP should be used

Nigel Davies, Head of Accountancy Services, Charity Commission

1C Merging NHS charities

As a result of the merger of the corporate trustee NHS bodies, the NHS charities have also been merged. This session will consider the lessons that have been learned along the way

Kendre Chiles, Head of Financial Services and Andrea Croud, Financial Accountant, University Hospitals of Derby and Burton NHS Foundation Trust

2A Dealing with (complicated) legacies

This is a case study on dealing with a particularly complex legacy to learn lessons for managing with any legacies

Andrew Machin, Associate Director of Charity Development & Project Manager, Central and North West London NHS Foundation Trust and Jon Shankland, Partner, RadcliffesLeBrasseur

2B Fund Rationalisation – one NHS charity's journey

NHS charities often have multiple funds which can be complicated to manage and may not always allow charitable funds to be used most effectively. This session will consider one NHS charity's experience but will allow delegates the opportunity to how to, and whether to, rationalise funds

Ken Godber, Charity Director, Chesterfield Royal Hospital Charity

2C Counter-fraud and cybersecurity for NHS charities

This session will look at the work that the Charity Commission is doing to prevent and detect fraud in the charity sector

Alan Bryce, Head of Development, Counter Fraud and Cyber-Crime, Charity Commission for England and Wales