

One Day Specialist Events on Accounting, Regulation, and Structures for Charities



Kubernesis Update Seminars • Spring/Summer 2010

SEMINARS IN YORK FOR: Charity professional advisors, finance staff, accountants, legal advisers, treasurers, charity managers, appeal officers, trustees, development workers, auditors/independent examiners, and anyone at all involved in detailed work with organisations with charitable status.

Charity Accounting and Reporting: Update for 2010

WED 3 MARCH 2010

Ref: K301

Charity accounting and reporting has seen major changes since the last full review of the Charities SORP in 2005. New issues taking effect from 2009/10 include reporting on *public benefit*, further changes in *thresholds*, new rules on *group accounts*, changed audit and independent examination rules for *charitable companies* and the first *accounts for CIOs* — plus the consultation of merging UK accounting standards (GAAP) into *international financial reporting standards* and what this means for SORP. This event will recap the current framework on charity accounting across England/Wales, Scotland, and Northern Ireland and examine the changes to give a fully updated picture of the requirements which apply to charities preparing accounts in 2010.

Charity Law, Structures and Regulation: Update for 2010

WED 12 MAY 2010

Ref: K302

The Charities Act 2006 has brought a complete new definition of "charity". The *public benefit test* is now central, with some charities having failed the test — the real issues of the public benefit requirement will be considered in detail. The Act is not just for registered charities: many formerly exempt and exempt charities (especially churches) are affected and some are now required to register. Also, many organisations in sectors such as sport, environment, community development are now included in the new heads of charity in the 2006 Act. This event will also include an analysis of legal structures for third sector organisations, including Community Interest Companies (CICs) and the eagerly-awaited Charitable Incorporated Organisations (CIOs). It will also discuss the new regulation of charity fundraising expected to take effect from 2010/11.

CIOs: Constitutions and Conversions Intensive Workshop

WED 30 JUNE 2010

Ref: K304

The new legal structure of *Charitable Incorporated Organisations* (CIOs) which is finally due for implementation in late spring 2010 is one of the most significant opportunities for the voluntary sector. But whilst many people appreciate the general benefits of the CIO, this seminar will go much further providing an in depth workshop for those who will be active in establishing CIOs. It will cover: preparing constitutions, applying to register a CIO, and supporting existing charities through the conversion process.

(Note: This seminar will assume some prior understanding of CIO principles and on charity governing documents and charitable status/regulation — e.g. from seminar K302 above.)

To make a booking just return the form opposite or for more details please call 01904 788885 or e-mail training@kubernesis.co.uk

BOOKING FORM

To:

The Kubernes Partnership LLP
36 Acomb Wood Drive
YORK YO24 2XN

Tel: 01904 788885

Fax: 01904 339117

E-mail: training@kubernesis.co.uk

Please book the following to attend the Kubernes Seminars shown. (If different people are attending different seminars, please copy this form.)

PARTICIPANT(S):

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ORGANISATION:

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Address:

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EVENTS BOOKED (DATES):

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ADVICE SERVICE: £120 for
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* Single places: **£140** fully inclusive.

Two or more places for the same
organisation: **£125** per place (for
multiple events and/or attendees).



KUBERNESIS UPDATE SEMINARS

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Please complete details overleaf and return to:

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YORK YO24 2ZB

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(But for last minute bookings please send 1st class to the address overleaf, or book by telephone, as Freepost can take up to a week.)

TO BOOK BY CREDIT/DEBIT CARD, please complete:

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— Or tel 01904 788885 to make a credit/debit card booking by phone.

For further help and advice before and after the Seminar, why not join the KUBERNESIS CHARITY ADVICE SERVICE?

Just £120 for 12 months help
If booked at the same time as a Seminar (normally £150)

Many charities and firms who attend our seminars belong to this service, which allows you to contact the seminar leader by e-mail or telephone for help or advice with short queries on your own specific issues regarding charity accounting/tax/regulation. It also includes a printed newsletter 2-3 times/year with detailed articles on these issues, and e-mail updates for major announcements in between (further details available on request).

To join, just tick the box overleaf or let us know if booking by phone.

PRACTICAL DETAILS

Venue and Timing: All events on this leaflet will be held at the new *York Science Park* adjacent to York University. This is an ultra-modern, fully accessible building, with on site parking, with a direct tram-bus service every 10-12 mins from York station. Seminar times are **10.15am** (for 10.30) **to 4.30pm**.

Note: York has excellent rail services from across the north of England and from London and Edinburgh. For those wishing to stay overnight or combine an event with a short break in York, we can provide details of local hotels.

Content and Approach: Our 2010 events are in-depth updates, with emphasis on the *professional issues* for those managing charities or advising on charity accounting and constitutions. However, the background to each issue will be explained, so whilst most participants will have a good deal of charity experience, the events will also be highly valuable to those new to the sector.

Jurisdictions: In content, we aim to cover the requirements for charities throughout the UK. Starting from the rules for England & Wales, key differences in Scotland and Northern Ireland will always be addressed where relevant.

Prices/What is Included: Single places: **£140** fully inclusive. Two or more places booked together (people or seminars): **£125** each. The terms include: presentation sessions - with opportunities for questions and discussion, extensive handouts, refreshments morning & afternoon, and a quality buffet lunch.

Numbers: These events are intended to take the form of seminars with plenty of individual discussion, so numbers of participants are limited to 14 for each day. *So do book in good time* to secure a place — some of our events fill up quickly and further bookings have to be refused.

Seminar leader: All these events are presented by Dr Gareth Morgan, senior partner of The Kubernes Partnership LLP, who has over 20 years experience in training for charitable organisations. In addition to his work in Kubernes he is also *Professor of Charity Studies* at Sheffield Hallam University. He followed every step in Parliament which led to the Charities Act 2006 and has been heavily involved in the consultations on the latest charity accounting regulations. He is the author of *The Charity Treasurer's Handbook* (DSC 2nd edn 2008) and of *The Charities Act 2006: A Guide* (ACF 2007). He acts as independent examiner and charity consultant to a wide range of organisations and he undertakes extensive academic research in the field. He is a Fellow of the Association of Charity Independent Examiners and a Certificated Full Member of the Institute of Fundraising. He is also an active member of the Charity Law Association and has served on several of its working parties.

Bookings/Further Information: An outline programme with more details of each seminar is available on request. For this or to make a provisional booking, please call Sharon Morgan on **01904 788885** or e-mail training@kubernes.co.uk. Provisional bookings will be held for 7 days (or until 3 working days before the event if sooner) — however, confirmation and directions can only be sent once we have received payment.

Special requirements: If you have a disability or special dietary needs which may affect your participation in the course, please let us know *at the time of booking* and we will do all we can to accommodate your needs. (We always allow for vegetarians — no special request needed.)

Cancellations: If *you* have to cancel or alter a booking, please give as much notice as possible — if you let us have at least 21 days notice, the fee will be refunded less £25 administrative charge. No refunds or transfers of date are possible less than 21 days beforehand, although we can send the handouts to you if you are unable to attend. Substitutions can be accepted up to 09.30 the previous day. Occasionally we may have to cancel a seminar (e.g. due to insufficient numbers) but this will not be done less than two weeks ahead except in an emergency (such as illness of presenter). In such cases a full refund of the fee will be offered, but we cannot be responsible for any other expenses.

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