



Finance training for charities

Tailor made for trustees

Trustees bring many skills to the table, but they may not have encountered charity finance before. The accounts look different, the business models are different and you cannot measure performance simply by financial metrics. A briefing from experts will give trustees the insight they need.

Financial training from Sayer Vincent will help trustees understand their role in financial governance and become more relaxed in dealing with figures, and give them the skills and confidence to manage finances effectively. A skilled professional trainer, bringing in-depth understanding of the charity sector, will design and deliver a customised training programme that incorporates your specific requirements and is tailored to the way your organisation works. This can be one session or a series of sessions forming part of an induction programme.

Topics we can cover

- Reading charity accounts
- Setting reserves levels
- Identifying early warning signs of financial problems
- Questions you should ask
- Financial information you should expect from the management team

Outcomes from finance training

- All trustees will be aware of their responsibilities on financial governance
- Trustees will be able to interpret information better
- Communication between trustees and staff will be based on a common language and better understanding

Better decisions can be made because there is a greater clarity over financial issues

Sayer Vincent are experienced trainers and run courses for many organisations in the not-for-profit sector. With 30 years' experience in the charity sector, we have practical knowledge of the issues you face.

We also provide external audit, internal audit and advice services to charities, schools, arts organisations and social enterprises, using a collaborative and user-friendly approach.

"The session on trustee responsibilities was very well presented and easily understood. We applied the information to our own organisation. This was a tremendous advantage as some trustees had no training."

Nancy Logue, Pallottine Sisters

"We always get very positive feedback from delegates about Sayer Vincent's training and we are delighted to include these workshops as part of our programme."

Carol Mack, ACF's Deputy Chief Executive



Getting started

- Following our initial contact with you, we will discuss your particular challenges, the aims of the training and possible solutions. We then draw up an outline programme of the training, including content, approach and costs, and agree this with you.
- You may wish us to help with a training needs assessment as a first stage in the process to ensure that the participants have had an opportunity to input into the design. Potential participants complete a pre-course questionnaire tailored to your organisation. We analyse the returned questionnaires and report back to you on the findings.
- As part of the preparation, we look at examples of the information you produce. We review these and make sure that Sayer Vincent trainers understand how they are used.
- We then convert these materials into case studies to be used as part of the training, and send them to you for feedback and approval.
- We carry out the training at your organisation. Our approach is very participative, using a workshop style, and is ideally suited to training in small groups. Participants receive hand-outs during the training which they can use and refer to afterwards.
- Participants complete evaluation forms and we feedback and evaluate the results of the training with you.

Fees

In-house training fees start from £750+ VAT for a two-hour session. We can tailor programmes to your needs and fees are agreed in advance. We provide all materials including booklets from our made simple series as appropriate.

Contact Sayer Vincent at svinfo@sayervincent.co.uk or 020 7841 6360 to find out more and discuss your needs.

How we do it

Sayer Vincent's approach is different to training companies or colleges offering generic accounting and finance management courses. We plan and tailor our training to meet your specific needs:

- We bring your management information and supporting documents to life by using samples of them as case study material.
- We help people understand the specific terminology that you use in your organisation, and explain complicated financial terms in plain language.
- We give people the confidence to use figures and financial data.
- We develop practical exercises for you to work on so that you gain experience in a 'safe' situation.
- Your guidance manuals and induction manuals can be brought in as part of the training.
- Your organisation's annual accounts can be one of the case studies used in the training.
- We involve finance and other staff in delivering the training, if appropriate.

All our training is based on an action-learning approach. Sessions can be run in small groups. We can also provide one-to-one coaching and support.

Sayer Vincent LLP

Chartered accountants and statutory auditors

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