

ACAT Conference 2023

Maximising Resources: Being Efficiently Effective



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Resources of time, talent, relationships, cash and buildings – being good and faithful stewards

‘To those who use well what they are given, even more will be given...’ –Matt 25 v29

My background

- Qualified accountant- FCCA and DChA
- Senior roles at the Charity Commission 2001- 2022
- Joint Chair Charities SORP Committee 2014- 2022
- Co-wrote current Charities SORP
- Drafted or oversaw updating of Charity Commission financial guidance and also advised on regulatory casework
- Led on collaborations with professional and sector bodies
- Now a volunteer for four organisations including ACAT (also a part-time consultant)

Exploring faithful stewardship with five themes

- Volunteers
 - Leaders and leadership
 - Collaboration and partnership
 - Money
 - Buildings
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- Thank you- for your commitment as volunteers serving the Church
 - Heart for today is: to be together, share experiences, and reflect on opportunities



Making the most of time- Investing in volunteers (liV)

- Idea began in London in 1995 and from 2003 became a UK wide collaboration- the UK Volunteering Forum
- Aim of the liV standard is to improve the volunteer's experience
- Assessment covers 6 areas: vision, planning, inclusion, recruiting and welcoming, supporting and valuing and developing volunteers
- Award once made lasts 3 years before being reassessed
- Assessor is assigned to support the charity- fees vary by scale from £1,600 (participating charities range from a few to 15,000 plus volunteers)
- Key to success is having a lead person and to talk with your volunteers from the outset. Aim to complete liV accreditation within 12 months.

Making the most of time- volunteers and InHope

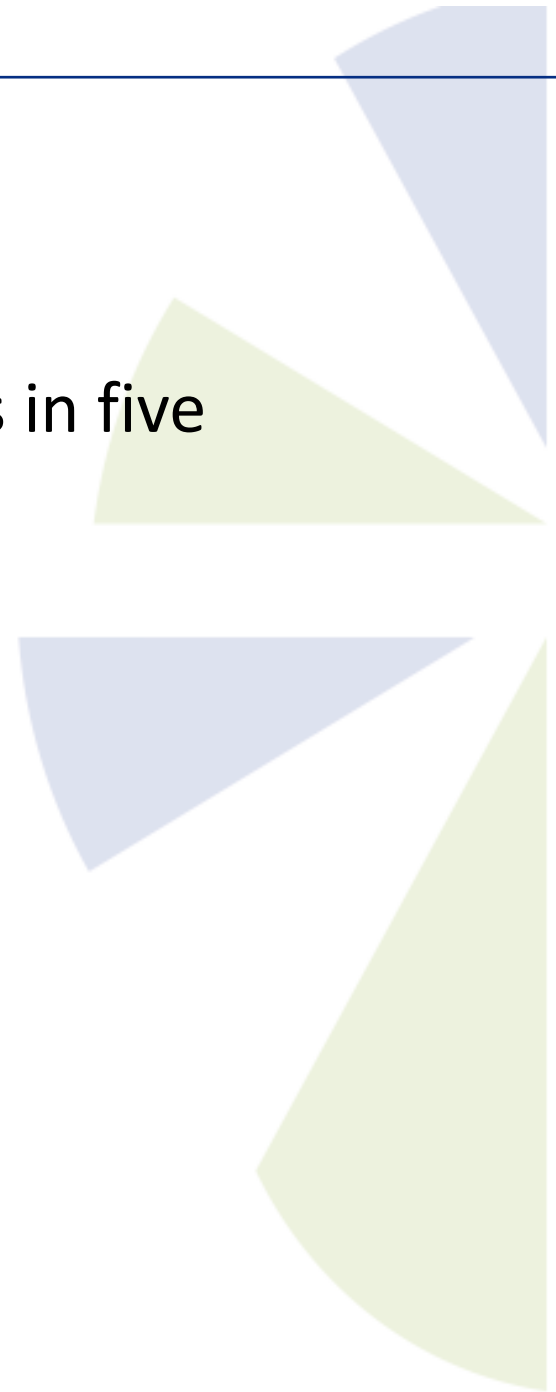
- Began by volunteers, been operating for 35 years with over 300 volunteers and 23 staff involved in serving the vulnerable and homeless in Bristol
- Christian ethos is central to the work and part of the volunteer briefing
- Volunteers are key to all four ministries: Wild Goose Café, Spring of Hope shelter, Life recovery and the foodbank
- Sr Mgt Team saw liV and a new volunteer manager role as essential to growing and supporting the work
- Doing liV fostered a team approach with input of volunteers into policy and decision-making. The assessor showed empathy and shared helpful experience from other charities on working with volunteers
- Demonstrates to volunteers how much they are valued- volunteering is a witness of the Christian life to clients

Making the most of time- talent and leadership

- Woodlands Group of Churches chose to have an external review (2022) which included reflections on leadership
- Leadership is releasing and equipping people to serve (Eph 4 v12)
- Leadership is more than trustees and senior leadership team, it extends to leaders of each congregation, leaders of home groups and those leading ministries
- Extends to equipping people to be influencers for Christ in their community and workplace
- To foster leadership- creating an academy

Leadership academy

- Woodlands academy will look to foster and equip leaders in five schools
 - Church planting and evangelism
 - Leadership and ministry
 - Spirit
 - Worship
 - Pastoral care and wholeness
- Women are recognised as leaders across all ministries



Tips and challenges- talent and leadership

- Tips:
 - Plan for senior leader transition- foster a team approach and allow time
 - Consider how your community context is changing and how your church must develop to address that context
 - Be open to change
- Challenges
 - Growing the new generation of leaders
 - Growing single people in ministry
 - Working through what inclusion means to your trustee body and how then to foster that inclusion eg evening meetings to allow full time workers to join

Making the most of time and relationships

- Being the body through collaboration with other ministries
- Opportunities to share- skills, knowledge, facilities, buildings and funds
- Joint endeavour- coming together to minister- respecting distinctive traditions
- Networking to learn- experiences, lessons, and take counsel

Making the most of time and relationships- The Noise (Bristol)

- Originally inspired by a similar initiative in Manchester in 2000- the annual Noise event began in 2001 with 2 projects and 150 volunteers and by 2023 grew to almost 1,000 volunteers and over 10 to 15 projects. (Had to overcome suspicion from community/ council and criticism from wider church- now highly regarded though)
- Focus on serving the vulnerable including deprived city wards
- Five values underpin a shared endeavour: getting practical, serving community, building unity, showing generosity, engaging generations
- Open to all churches- 'showing God's love in practical ways' with the aim of bringing in and supporting smaller churches
- Moving on to a new vision for 2024- Noise365 offering resources to equip the wider church to engage with community with: resource bank, training, volunteering opportunities and consultancy support

Making the most of giving (ACAT Handbook Ch 13)

- Handbook offers advice on
 - Gift aid
 - Gift Aid Small Donations Scheme
 - Legacies
 - Profits remitted under gift aid
- Tax relief on income from charitable trading
- Tax relief on rental and investment income
- (Not a general relief from all taxes though)
- If fundraising refer to relevant regulators' guidance



Making the most of cash- spending

- VAT Zero rating on some purchases eg construction of a charitable building
- 5% VAT rate on heat and power
- 80% non-domestic rate relief (Local Authority may choose to top up to 100%)
- Sound internal financial controls- Ch3 ACAT Handbook
- Look to church umbrella body on tips for good purchasing or procurement
- Manage any conflicts of interest if provided by trustees/ persons related or connected to trustees

Making the most of buildings- Ebe Church

- Ebe shares its building with The Noise and North Bristol & South Glos' Food Bank (largest in the South West)
- Advantages to Ebe- brings an outward focus, a rental income – financial sustainability, fits with the church mission to serve Filton, fosters engagement and collaboration with others, including local government, people see church differently as in community
- Things to watch for- shared values, “collaboration can be messy” so needs commitment from all eg additional pressures to manage around space- Ebe culture is “hold God’s resources lightly”
- By being more than a church meeting they hope to access new streams of funding to support mission eg community resilience fund

Stewardship and witness- effective reporting and timely filing

- Most must file your report and accounts – rules vary but public have legal right to ask you for a copy
- E&W if over £25,000 published on the web (almost 1m views pa), Scotland planning to do the same- you can't say no one will read them
- What is your witness like- an exercise in compliance or a telling of your charity's story of faith?
- Late filing or non-filing- a poor witness and a red flag to the regulator (and if a company you might be fined- maladministration)
- Responsibility lies with the trustees

Resources- organisations & ministries highlighted

- Investing in Volunteers standard (fee payable): <https://investinginvolunteers.co.uk/six-step-process/>
- NCVO (free on-line tool): <https://www.ncvo.org.uk/help-and-guidance/involving-volunteers/investing-in-volunteers-iiv-essentials/#/>
- InHope website: <https://www.inhope.uk/> and contact details: Amelia.glanville@inhope.uk
- The Noise (Bristol): website <https://www.thenoise.org.uk/> and contact details: info@thenoise.org.uk
- Ebe Church Bristol: website <https://www.ebe.org.uk/> and contact details: info@ebe.org.uk
- Woodlands Church: website <https://www.woodlandschurch.net/> and contact details: ed.marsh@woodlandschurch.net

Free resources- from the regulators plus SORP

- Charity Commission England and Wales: <https://www.gov.uk/guidance/charity-commission-guidance>
- Office of the Scottish Charity Regulator: <https://www.oscr.org.uk/guidance-and-forms/>
- Charity Commission Northern Ireland: <https://www.charitycommissionni.org.uk/charity-essentials/view-all-guidance/>
- HMRC (gift aid): <https://www.gov.uk/claim-gift-aid>
- HMRC (charity reliefs): <https://www.gov.uk/charities-and-tax/tax-reliefs>
- Fundraising Regulator: <https://www.fundraisingregulator.org.uk/>
- Scotland Fundraising Adjudication Panel: <https://goodfundraising.scot/>
- Charity SORP: <https://www.charitysorp.org/>

ACAT resources

- Handbook –topics include: employment, annual report, tax efficient giving, IT and software, and data protection
- Links to guidance and video talks- topics include: role of the treasurer, GDPR, budgeting and fund accounting
- Email help facility for member questions and list of FAQs (popular questions answered included tax, gift aid, employment and trading)

Today's exhibition resources

- Exhibitors are:

- CAF Bank
 - Bate Wells
 - Data Developments
 - easyfundrasing
 - iKnow Church
 - JustMoney Movement
 - Liberty Accounts
 - Parish Giving Scheme Ltd.
 - Trinitas Church Insurance
- Share your experience through conversation



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