



Charities

Conference 2025

Charities Conference Agenda

6 March 2025

9.30am

Welcome and Introduction

9.35am

Charity Commission Regulatory Update

Clair Tilson, Charity Commission

This session will cover:

- Charity Commission Regulatory Update: including updates to guidance, SORP development update and any other key updates on the Charity Commission's work.

10.20am

Refreshment Break

10.25am

Employment Law

Nick Hobden, Thomson Snell & Passmore LLP

This session will cover:

- Harassment of employees in the workplace by third parties, new changes and new penalties which could impact a charity's financial position.
- Restrictions on zero-hour contracts and the implications for charities engaging bank staff on zero hours contracts, which could increase costs for charities or rely on zero hours staff.
- Day one rights to unfair dismissal, the status of probationary periods and changes to statutory sick pay, meaning more costs to charities and potential difficulties in dismissing people.
- The ban on fire and re-hire unless there are particular circumstances which allow such a measure to be undertaken by employers, meaning it is more difficult to change terms and conditions of employment, like pay and hours.

11.25am

Refreshment Break

11.35am

VAT Update

James Hurst, Mercia Group

This session will cover:

- A selection of VAT issues commonly encountered by charities. It will include an update on relevant topical items such as recent VAT tribunal decisions and HMRC policy changes that impact charities.

12.20pm

A Charities Perspective

Sylvia Holder, Venkat Trust

This session will cover:

- Sylvia will be discussing her personal experience in building a charity. Very unexpectedly, she impulsively committed herself to bringing education to a poor fishing village in South India. At the age of 65, she had just retired from running her own PR company in London and was looking forward to a leisurely lifestyle. That was 21 years ago. Her life turned out to be anything but leisurely and despite having no previous knowledge of working in India, charities or education, she has a remarkable story to tell.

12.50pm

Lunch Break

1.50pm

Hot Topics in Charity Accounts

Peter Herbert, Insight Training

This session will cover:

The preparation and scrutiny of charity accounts throws up many challenges. This session will update you on recent and forthcoming rule changes and also deal with a number of common problem areas. Topics covered will include:

- Latest updates on implementation of the revised SORP – effective 2026.
- Changes to charity audit limits – the direction of travel.
- Tricky accounting, audit and independent examination issues and how to tackle them.
- Latest professional body feedback on charity audits and independent examinations.

2.50pm

Refreshment Break

2.55pm

Direct Tax Update

Jon Daley, Crowe U.K. LLP

This session will cover:

- A general update of recent tax developments relevant to the charity sector, together with a refresh of key tax pitfalls and opportunities for charities.

3.45pm

Refreshment Break

3.55pm

Lessons from regulatory casework

Gemma Archer, Mercia Group

This session will cover:

- Examples of recent regulator caseworks and decisions to identify the lessons for both trustees of, and auditors, independent examiners and advisors to charities, and the responsibilities of independent examiners and auditors to report matters of material significance.

4.40pm

Close of Conference

CPD Hours: 6

Programme correct at the time of publication. Mercia Group Ltd reserve the right to change the programme and speakers as a result of circumstances beyond our control. See the website for updates.

Speakers

Clair Tilston

Clare is a Senior Accountant at the Charity Commission providing expert advisory support to the Commission's regulatory cases and policy work. Prior to working at the Charity Commission she worked as a Forensic Accountant in BDO and Deloitte.

Nick Hobden

As head of the Employment, Charity, and Education sector teams at Thomson Snell & Passmore LLP, based in Kent (the oldest law firm in the world), Nick brings over 34 years of experience advising clients in the charity, education and social care sectors. Recognised consistently as a 'Leader in the Field' by Chambers & Partners (2011–2024) and listed in the Legal 500 directory Hall of Fame section as a leading lawyer, Nick is praised for his professionalism, attention to detail, and pragmatic approach to resolving complex issues.

Nick provides bespoke, strategic advice to navigate the unique challenges his clients face.

He advises extensively on employment, equality, and education governance law, providing practical and innovative solutions tailored to the needs of charities and their professional advisers. His expertise includes, Tribunal and High Court claims, Restructuring and Compliance, Boardroom and Senior-Level Disputes as well as sector-specific advice.

Nick is approachable and reliable, frequently delivering clear, practical, and actionable advice ahead of deadlines. His breadth of experience instils confidence from the outset, making him a trusted adviser for organisations navigating the complexities of the charity and education sectors.

James Hurst

James joined Mercia in October 2022 as VAT trainer and consultant. His role involves writing technical material as well as devising and delivering VAT training courses. James has a wide experience of VAT and indirect tax, beginning his VAT career with HM Customs & Excise (as it then was) before moving to the private sector in 1995 and gaining his CTA qualification. Latterly, he had VAT partner and head of VAT roles in Grant Thornton and Mazars.

Outside of work music remains a keen interest. Aside from playing jazz on the tenor sax, James is a regular member of the trumpet section of the Leeds Project Big Band.

Sylvia Holder

Sylvia lived and worked in a number of countries before setting up Holder Swan Public Relations in London with fellow trustee Lindsay Swan. It was while in India on a business trip for a travel client that she met Venkat which

15 years later was to change her life dramatically and the lives of many others. She won The Times Sternberg Active Life Award in 2012 and was awarded the British Empire Medal (BEM) in the 2018 New Year's Honours for "services to education in Kovalam, India". Together with Lindsay, Sylvia has co-authored a book *Accidental Lives* which tells the remarkable story that unfolded as a result of the chance meeting. It was published by Black Spring Press in November 2024.

Peter Herbert

Peter qualified as a Chartered Accountant with an international accountancy firm before working in industry. He has over 20 years of training experience. He writes and presents technical updates for firms of accountants and qualified accountants of private and listed companies. Peter specialises in financial reporting, auditing and practice regulation. Peter also regularly carries out compliance reviews for firms of accountants, which provides him with an invaluable insight into the practical financial reporting and auditing issues that they face.

Jon Daley

Jon has advised charitable organisations for over 14 years on a broad range of tax matters such as charitable trading reviews, corporate restructures, international operating structures, Gift Aid processes and creative industry tax relief claims. At Crowe UK Jon works closely with advisers in the firm's social purpose and non-profits function to provide complete advice to charities which cover tax issues in parallel with regulatory, commercial and other matters.

Jon has a wide variety of experience across the charity sector, working with NGOs, educational bodies, grant making organisations, members' clubs, religious orders, social enterprises and arts and cultural organisations. Jon is qualified as a chartered accountant and chartered tax adviser and has presented and contributed to a number of technical commentaries and seminars including with the ICAEW and Charity Finance Group.

Gemma Archer

Gemma, jointly leads the team responsible for Mercia's file and compliance reviews, including performing reviews at client sites or remotely. She also lectures on Mercia's Early Careers Programme and on specialist areas such as charities and academies, ESG and Mercia methodology, as well as advising clients on technical queries.

Gemma joined Mercia from audit practice in January 2021, where she had worked for 13 years, specialising in not-for-profit and charity clients for over a decade. Gemma has a keen interest in academies and sits on several ESFA working groups.