



"OVERALL AUDIT SERVICE AWARD" - WINNER 2008
Annual Charity Finance survey

not for profit | consultancy services for charities

the team



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why you may want assistance

There is an increasing level of pressure on charities due to the constant pace of change in the sector. We therefore offer a selection of consultancy services which have been devised especially for charities and are delivered by our charity specialists to help in areas which we believe are particularly important.

The following shows what we offer.

improving financial reporting

There are currently many demands on the voluntary sector to improve their financial reporting. These include reporting on impacts and outcomes. High quality financial reporting combined with appropriate measurement can greatly improve performance.

guidance on strategic and operational planning

Trustees are responsible for the strategic direction of the charity, although it is often the management who are responsible for the detailed work. It is important that charities produce robust strategic plans if they are to achieve their objectives supported by operational plans. You may need help to improve or set up your planning systems.

considering governance

Governance is a very topical issue and effective governance of charities is vital to meet the challenges in the sector. It encompasses a range of subjects from evaluation of the composition of trustee boards and committee structures to reporting to the trustees. A review of your governance arrangements may prove very valuable.

benchmarking

Comparisons with other similar organisations can indicate areas for improvement. You may wish to have assistance in benchmarking your activities and then help with improving your performance in weaker areas.



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management of change

Change in the Finance Department or elsewhere in the organisation always presents major challenges. We can assist you with managing change effectively as well as advising on what changes would be most valuable.

help with mergers

Mergers are on the increase in the sector and there are many areas to consider together with due diligence to carry out. You may require our assistance to ensure the right areas are considered and that the due diligence is appropriate and properly performed.

guidance on setting up an internal audit function

Many charities are considering whether they need an internal function and how to set it up. This requires consideration of the benefits of an internal audit function, the resources required and the various options for the service provision. We also provide internal audit services, and ad hoc reviews as required.

preparing for Charity Commission visits

Our experience shows that the Charity Commission visits are supportive and are usually considered a valuable experience. However, some charities may want to think through the areas the Commission may look at in advance and may require assistance with this preparation.

consideration of your risk assessment process

Whilst risk assessment has been a requirement for a number of years, there are many charities who are not getting the full benefit from the process and where the process perhaps needs reconsideration. This involves looking at best practice, assessing your methodology and considering the best way forward.

recruiting the key members of your finance team

Getting the right people in your finance team is vital. We can assist you with the interview and recruitment process to help ensure the best decision is reached.

measuring results, outcomes and impacts

Measuring the performance of your charity is becoming increasingly important for both external reporting and to influence future activities. This requires identifying the main measures and establishing the reporting framework.

who will deliver the services

Our consultancy services are delivered by our charity specialists who are as follows:

- Our charity specialist partners and managers. We have a group of eight partners and six managers who work almost exclusively in the charity sector. They can bring a wide range of experience from having worked with many charities over many years. A number of them also work in the sector as Trustees.

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- Our dedicated consultant, Leslie Jones OBE. Les has worked in the charity sector for many years, most recently as Deputy Chief Executive and Director of Finance and Services for WWF. He was also deputy chair of CFDG, a board member of the Charities Consortium and is a treasurer of a number of charities. He recently chaired the CFDG committee which issued their report on inputs. Les can therefore bring his first hand experience of the charities sector to assist with your issues.

about haysmacintyre

haysmacintyre, Chartered Accountants and business advisers, works with over 550 charities and not-for-profit organisations in the UK and overseas. Our services include the full range of audit, tax, VAT and comprehensive advisory services. Our multi-disciplinary specialist team has extensive sector experience working for a diverse range of charities. We are based in one location which ensures an integrated and comprehensive approach to our clients' requirements.

haysmacintyre is a founding member of MSI Global Alliance (MSI), an international alliance of independent legal and accounting firms, with 250 members in 100 countries.

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