

Charity law conference

Location & Date

Date: 27th February 2020

Time: 09:00 - 16:20

Location:

Law Society of Scotland
Atria One
144 Morrison Street
Edinburgh
EH3 8EX

CPD Hours: 5hours 30minutes

5.5 hours verifiable CPD

Join us this February for our new Charity law conference, shaped and designed based on member feedback. Scottish charities hold a primary position in society. As society evolves, so does the law which regulates and guides it. Come along, be informed and stay updated.

Whether you advise charities in private practice, or work in-house, throughout the day, each session will give you important reference points and top tips on all stages and challenges in the 'life-span' of a charity.

You will also have the opportunity, at the end of each session, to join the expert speakers in the discussion on the latest developments and to ask questions on specific matters affecting your practice.

Are you a solicitor who specialises in Charity law and would like to develop your career and marketing in this area? If so you may want to think about applying to become an Law Society of Scotland accredited specialist. To find out more see Accredited Specialisms.

Learning outcomes

At this event you will gain:

- An understanding of when a charitable status is suitable for your client organisation
- Practical guidance on how to best manage the needs of your charity clients from establishing to governance
- Insights into reforms and regulations, and their implications for your practice

Confirmed speakers

- **Jayne Stuart**, ACOSVO
- **Victoria Simpson**, Director, Anderson Strathern LLP
- **Gillian Harkness**, Director, Burness Paull
- **Catriona Watt**, Partner, Anderson Strathern LLP
- **Gavin McEwan**, Partner, Head of Charities, Turcan Connell
- **Lynne Lamont**, Head of Charities (Scotland), Brewin Dolphin
- **Helen Kidd**, Associate, Brodies LLP
- **Celine Sinclair**, CEO, The Yard

Programme Details

09:00 - 09:20

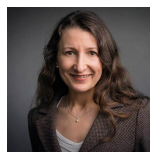
Registration and refreshments

09:20 - 09:30

Welcome and introduction

Speaker

Victoria Simpson, Director, Anderson Strathern



Victoria is a Director and Head of Charities. She advises on all aspects of charity law and charity tax law and acts for a wide range of Scottish, dual registered and international charity clients.

Victoria is accredited by the Law Society of Scotland as a specialist in charity law. She is also a private client practitioner and is tax and investment qualified. Victoria co-wrote "A Practical Guide to Scottish Charity Law", published by Greens in 2016.

Victoria sits on the ICAS Charities Panel, the Law Society Charities Committee and the ECOG Inspiring Communities Group. She also sits on the HMRC working party to review gift aid.

Victoria has been a trustee of a large Scottish charity for over 12 years and has first-hand experience of the issues affecting the charity sector.

Session one

An overview and inside perspective

09:30 - 10:10

Life cycle of a charity: challenges and solutions

Speakers

Jayne Stuart, Sustainability Manager, ACOSVO

Jayne Stuart currently works as Interim Sustainability Manager with ACOSVO, and as a freelance consultant to the Third Sector.

With a wealth of leadership, management and board-level experience, Jayne has established a career as a highly respected figure across voluntary, community and education sectors. Jayne has worked within charities at a senior level for over 20 years. Appointed to her first CEO position at the age of 31, Jayne progressed to leading one of the largest and most highly regarded adult education charities in the country, when becoming Director at WEA Scotland. Working closely with the Third Sector and Scottish Government, Jayne has influenced numerous national policies and strategies, working tirelessly as a strong advocate for equality and social justice in Scotland.

Having won a scholarship with Edinburgh Business School, Heriot-Watt University, Jayne completed an MBA with Distinction in 2019, building on previous post graduation qualifications in Community Learning and Development and Architecture.

Celine Sinclair, CEO, The Yard



Celine has been Chief Executive since 2006, leading The Yard with dynamism and passion. Celine has a long association with The Yard, having been on the Board of Directors before taking the reins as Chief Executive. Celine represents The Yard and disability interests on a number of committees and networks. She began her career at the BBC World Service before returning to education to

complete an MSc in Public Relations. Most recently, Celine worked in communications for Highlands and Islands Enterprise, and YouthLink Scotland.

Celine is a powerful influencer of external strategic thinking in local and national government, and in academic circles. In 2017, Celine was awarded Leading Light at the SCVO Scottish Charity Awards, as well as the 2018 Director of the Year at the Edinburgh Chamber of Commerce Business Awards and Director of the Year - Small Business at the 2018 IoD Scotland Director of the Year Awards.

10:10 - 10:15

Questions and discussion

10:15 - 10:55

Founding and running a charity: Inside perspective

- In-house perspective: challenges

Speaker

Graham Roberston, Director, Get The Gen

Graham is a Director of the charity ProjectScotland and runs their Social Enterprise - Get The Gen.

Through Get The Gen he has developed a portfolio of training services which focus on intergenerational working and supporting businesses on how best to recruit, progress and retain their young talent.

He has over 12 years' experience working in the Charity Sector having previously worked with Amnesty International and Plan International in senior roles in London. He is also a member of the Board of Trustees for the Lawscot Foundation a charity set up by the Law Society of Scotland and currently chairs their Fundraising Committee.

Graham was nominated for the Robert Burns Humanitarian Awards 2018 and his passion for young people and supporting Social Mobility shines through in every aspect of his work.

Before his charity career, Graham was a successful sportsman playing in both Scotland & England as a Professional Footballer for Raith Rovers and Millwall, and still has a passion for all sports.

10:55 - 11:00

Questions and discussion

11:00 - 11:15

Refreshments and networking

Session two

Managing charities and risk mitigation

11:15 - 11:45

Commerce in Charity Law

Speaker

Gillian Harkness, Director, Burness Paull

Gillian Harkness is a director in Burness Paull's Third Sector Team and is best known for her work on developing specialist structures within the third sector, including her expertise on mergers/consortium models/partnership models, transfers of operations and service delivery agreements. Gillian is a member of the Charity Law Subcommittee of the Law Society of Scotland and a member of the board of directors of the Edinburgh Festival Fringe Society, which is responsible for the organisation and running of the world's largest arts festival. "She tailors her support to take account of our particular requirements and is extremely responsive." Chambers Legal Directory.

11:45 - 11:50

Questions and discussion

11:50 - 12:20

Effective management of reserves

Speaker

Lynne Lamont, Head of Charities (Scotland), Brewin Dolphin

Lynne is a Divisional Director of Brewin Dolphin and Head of Charities for Scotland and has been providing advice to and investing assets on behalf of Scottish Charities for over 20 years. Lynne was involved in the investment consultation that led to the development of the Charity and Trustee Investment (Scotland) Act 2005 and more recently was an active member of the OSCRC consultation that led to the publication of the OSCRC Guidance, Charity Investments: Guidance and Good Practice. Lynne is a regular speaker at sector events and is dedicated to providing trustee training on investment matters as well as helping clients in the write their investment policy and in establishing ethical policies. Lynne holds an MA (Hons) from Aberdeen University and is an Associate of the Society of Investment Professionals and a member of CFA UK and the CFA. She has served as a Trustee for several charities, including the

Carnegie UK Trust, is married with two children and a keen traveller and outdoor sports enthusiast.

12:20 - 12:25

Questions and discussion

12:25 - 12:55

Reputation Management

Speaker

Catriona Watt, Partner, Anderson Strathern LLP

Catriona is a partner and Head of Professional Regulation at Anderson Strathern. She works with individuals, charities and others organisations across Scotland and the rest of the UK every day on issues which could affect their reputation. She is involved in public inquiries, fatal accident inquiries and more generally 'where things go wrong'. With a background as a former journalist, Catriona understands both the press interest and the legal issues when a crisis arises. Her main focus is on helping organisations to avoid the crisis.

12:55 - 13:00

Questions and discussion

13:00 - 13:45

Lunch and networking

Session three

Governance and regulations

13:45 - 14:25

Governance

Speaker

Victoria Simpson, Director, Anderson Strathern LLP

14:25 - 14:30

Questions and discussion

14:30 - 15:10

OSCR - Obligations, guidance and investigations

Speaker

Helen Kidd, Associate, Brodies LLP



Helen Kidd is an Associate in Brodies' personal & family team and focusses on advising on charity and third sector legal issues. Helen's experience includes setting up/merging/winding up charities; advising on governance, charity tax, and trading activities; administration of grant giving charities; trustee training and dealing with a wide range of regulatory matters. In relation to fundraising, donations, trusts and legacies, using her private client expertise, Helen advises on lifetime philanthropy and legacies/bequests.

Helen is a charity trustee of a national community-based youth work organisation and governor of an independent school giving her insight into strategic and operational matters affecting the charities sector.

15:10 - 15:15

Questions and discussion

15:15 - 15:25

Refreshments and networking

Session four

The road ahead

15:25 - 16:10

The road ahead

Speaker

Gavin McEwan, Partner, Head of Charities, Turcan Connell

Gavin is a Partner working principally in the fields of charity law, succession, trusts, tax and asset protection. He is the Head of Turcan Connell's Charities Team, a member of the firm's Charity Unit and is accredited by the Law Society of Scotland as a specialist in charity law. He is a member of the Charity Law Reform Committee of the Law Society of Scotland and the Charity Law Association Executive Committee and Standing Tax Committee.

Gavin's work in the area of charity law includes the establishment and reorganisation of charities, from Royal Charter bodies and major public trusts to smaller active and grant-making charities. He also advises a number of national institutions, arts bodies and historic houses.

16:10 - 16:15

Questions and discussion

16:15 - 16:20

Closing remarks

Prices

prices exclude VAT

Member:	£215.68
New member:	£179.38
Accredited Paralegal:	£179.38
Trainee:	£179.38
Unemployed member:	£166.56
Non-member:	£228.49