

Finance Count 2014

Third Sector Financial Management Benchmarking



A powerful tool to compare financial management information and performance with other third sector organisations

Key features:

- Pinpoints where efficiencies can be made
- Enables you to learn from others to improve performance
- Underpins strategic decisions for change with hard evidence
- Demonstrates accountability to donors and trustees

Focused and shorter questionnaire

Prices from £100 + VAT

Less than a day to complete

Early Bird Offer expires 22 November 2013

“A great way for finance professionals to benchmark their financial performance against their peers and the sector.”

Caron Bradshaw, Chief Executive, CFG

Finance Count 2014

Introducing Finance Count

In an environment where accountability and transparency are vitally important, the need for credible data on key finance functions such as transaction processing, treasury management, and central functions costs hold greater value than ever before.



Finance Count is a unique financial management benchmarking tool tailored specifically to the needs of the UK third sector, designed in partnership with the Charity Finance Group, and led by a steering group of finance directors.

By taking part in Finance Count you will get a clear picture of your strengths and the areas where your organisation could improve its performance.

Participation enables you to compare your organisation's performance with 7-20 of your chosen peers and with the sector as a whole.

Key Topics include:

- **Transaction processing:** purchasing, purchase ledger, expenses, payroll and income processing
- **Internal and external reporting**
- **Control and decision support:** planning, budgeting cash and treasury management, financial governance and public service delivery
- **Finance function:** staffing levels, qualifications, training, internal audit, effectiveness, leadership and planned changes
- **Central function costs:** finance, HR, IS/IT, estate management and trading

Benefits experienced by participants

- Identifies key improvement opportunities
- Gives reassurance for what is working well
- Pinpoints where efficiencies can be made
- Helps determine priorities for action
- Useful in setting meaningful and realistic targets
- Gain insight into good practice and how to achieve it
- Provides robust evidence to support change
- Enhances the ability to report back to senior management
- Provides evidence to donors and trustees that resources are being used appropriately
- Improves accountability

Participating organisations receive:

1. Organisation scorecard
 - Tailored to your specific organisation
 - Highlights your performance on key measures
 - Compares your results with 7-20 peers of your choice
 - Good practice from other participants
2. Drill down reports to explore your results in more detail
3. Contact details for other participants
4. Sector-wide and Detailed Statistics Reports
 - Executive Summary
 - Easy to read detailed statistics tables analysed by organisation size and type
5. Online access to the benchmarking database for 12 months
6. Invitation to Product Training workshop
7. 1-1 telephone consultation with a consultant

Using benchmarks from the study we have developed more efficient processes to help us reach our internal performance targets.

Himali Fernando, Accountant, The Brooke

New Feature – Connect and Learn

Take your benchmarking to a new level:

- Pinpoint good practice of particular relevance to you
- Make direct contact with those organisations



Publications – New

If you are unable to take part in Finance Count this year, you will be able to buy the sector-wide reports from February 2014. Simply go to www.agendaconsulting.co.uk/publications

Partners

Finance Count continues to be generously supported by Charities Finance Group (CFG), Sayer Vincent and Voluntary Organisations Disability Group (VODG).

Who does Finance Count?

More than 100 organisations of different sizes and from many sub-sectors are involved in Finance Count. This range gives you a wide selection from which to choose your peers.

From housing associations to social care providers; from conservation bodies to animal welfare groups; from international aid organisations to local youth centres; from theatres to research institutes, Finance Count gives current, credible and relevant data about organisations of all sizes, interest areas and income levels, to help improve financial management and provide reassurance and transparency to their stakeholders.

To see our list of clients and to see what they say about Finance Count, visit our website: www.agendaconsulting.co.uk/finance

Steering Group

The Steering Group plays a vital part in the evolution and refinement of the Study, bringing their personal experiences of using the Study and making recommendations for change. For instance, the questionnaire has been streamlined, thus simplifying the process and making it easier to complete in less time. The Group meets a couple of times a year and communicates throughout that time - we welcome new members - contact Agenda if you'd like to join.



healthy working animals
for the world's poorest communities



Timetable

| | |
|--------------------|--|
| October | Questionnaire available online |
| 9, 17, 22 October | Free Webinar Information Sessions |
| 5 November | Free Information Session, central London |
| 7, 13, 21 November | Free Webinar Information Sessions |
| 22 November | Early Bird expires |
| 29 November | Deadline for return of booking forms |
| 13 December | Deadline for completion of questionnaires |
| January 2014 | Choose peers |
| February 2014 | Publication of reports |
| March 2014 | Results Conference and Product Training Workshop |

Finance Count has made a big difference in how effectively we run the charity. I would encourage all charities to participate.

Andrew Whitehead, Director of Finance, Marie Curie Cancer Care

Want to know more about Finance Count?

Join one of our **FREE Webinar Information Sessions**, by emailing brita.benson@agendaconsulting.co.uk with your choice of date.

Join the **FREE Information Session** on **Tuesday 5 November**, 2pm - 4pm: learn more about the Study and listen to **Simon Hawkins, Head of Finance** from **The Blue Cross** explain how they have used Finance Count and the impact on the organisation.

To book your place, call Agenda on 01865 263720 or email brita.benson@agendaconsulting.co.uk.

Join the Study

Simply go online to www.agendaconsulting.co.uk/finance or complete the form overleaf and fax or scan it back to us.

The Finance Count benchmarking has been very beneficial to the organisation in its continuous improvement, highly recommended.

Javed Akhtar, Finance Manager, Islamic Relief

Finance Count 2014

JOINING FORM please complete and fax to 01865 791 325 or scan to brita.benson@agendaconsulting.co.uk

Sign up before Friday 22 November and receive an early bird discount. Go to www.agendaconsulting.co.uk/finance

| | |
|---------------|----------------------|
| Name: | <input type="text"/> |
| Job Title: | <input type="text"/> |
| Organisation: | <input type="text"/> |
| Address: | <input type="text"/> |
| Post Code: | <input type="text"/> |
| Telephone: | <input type="text"/> |
| Email: | <input type="text"/> |

Prices (please tick)

All prices subject to VAT

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|--|------|
| <input type="checkbox"/> Standard Price | £700 |
| <input type="checkbox"/> CFG/Sayer Vincent/VODG member Early Bird* Income £25m+ | £550 |
| <input type="checkbox"/> CFG/Sayer Vincent/VODG member Early Bird* Income £10m-£25m | £490 |
| <input type="checkbox"/> CFG/Sayer Vincent/VODG member Early Bird* Income £5m-£10m | £290 |
| <input type="checkbox"/> CFG/Sayer Vincent/VODG member Early Bird* Income £1m-£5m | £190 |
| <input type="checkbox"/> CFG/Sayer Vincent/VODG member Early Bird* Income < £1m | £100 |
| <input type="checkbox"/> Non-member Early Bird* | £600 |

* Early bird offer expires 22nd November 2013

Terms and conditions

No information will be attributed to individual organisations in any published report, with the exception of agreed case studies. Receipt of both reports is dependent upon completion of the Finance Count 2014 questionnaire. In the event your organisation is unable to complete the questionnaire, no refunds will be given.

I agree that the contact details of one member of staff will be available to other participants for the duration of the Study. I have read the description of the study and the terms and conditions above, and have selected the relevant payment option. Our organisation would like to take part in Finance Count 2014.

Signature

Date

Payment

There are four ways to pay:

1: Join and pay online at
www.agendaconsulting.co.uk/finance

2: Cheque by post

I enclose a cheque payable to Agenda Consulting Ltd
for the sum of: £

3: Invoice to your organisation

Please invoice our organisation (please tick)

4: Credit Card

Please charge my:

Mastercard/Visa/Delta/Switch/Solo/Electron

Card number:

Start Date:

Expiry Date:

Issue no: (Switch/Solo)

Security code: (last 3 digits on signature strip)

Name (as it appears on the card)

Billing Address

Signature (If emailing, please type name)

Please return this form to Brita Benson at: Agenda Consulting,
The Jam Factory, 27 Park End Street, Oxford OX1 1HU

T: 01865 263 720 F: 01865 791 325

E: brita.benson@agendaconsulting.co.uk