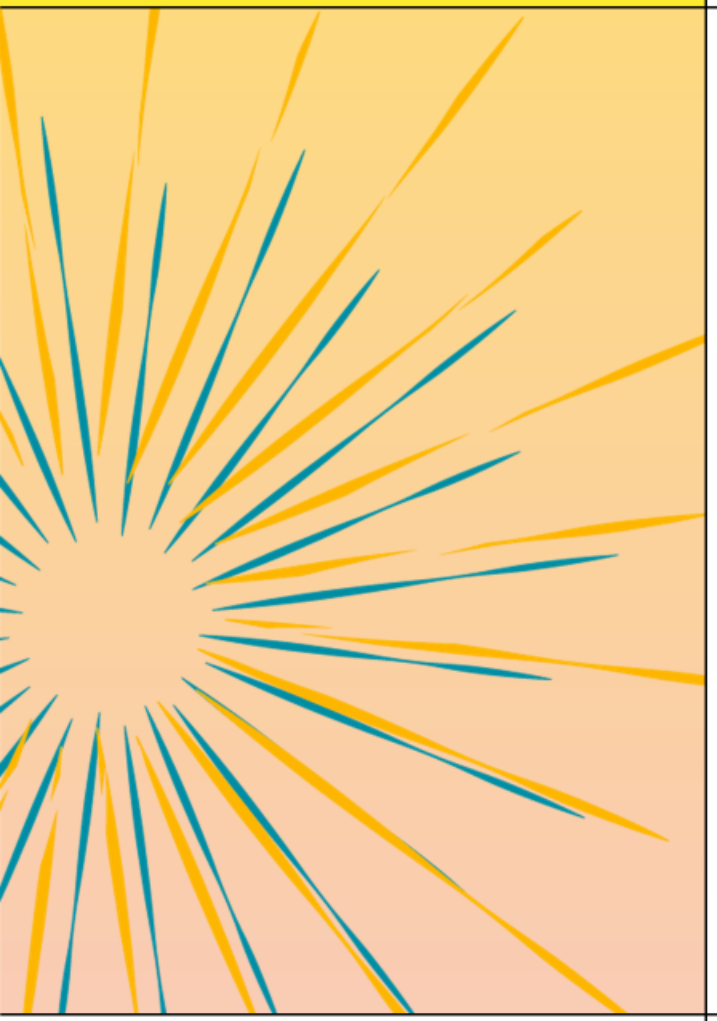
Eastside People

The Festival of Trusteeship 2026



Not a numbers person?
10 questions every trustee should ask

12.30pm Tuesday 10th November

Money matters strand

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Trustees' Week

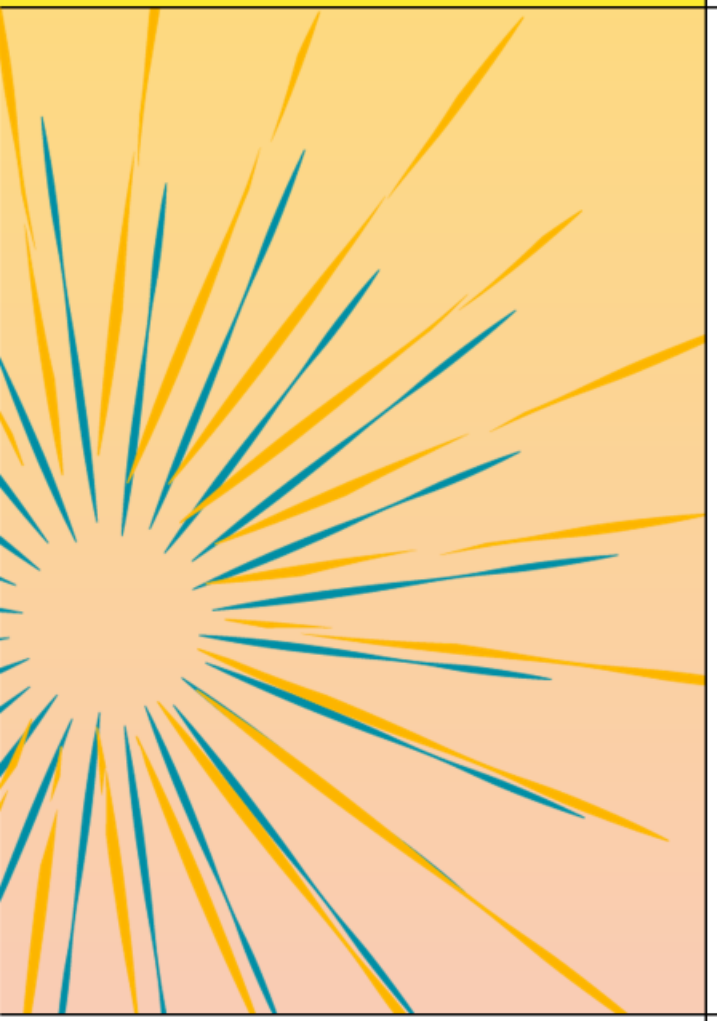
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Welcome! We're so pleased you're joining us for this session.

This session will be recorded. Please stay muted unless we ask you to unmute. It helps to make sure everyone can clearly hear who is talking.

Closed captions are available; you need to enable these.

Please use the chat to ask questions and share experiences. We'd love to hear from you. Please keep your comments respectful, useful and accurate.

Please also feel free to ignore the chat and focus on the discussion if you'd prefer. We always read out questions fully.

If you don't already have one, you can still purchase a weekly pass. Please visit the Eastside People website for details.

Trustees' Week

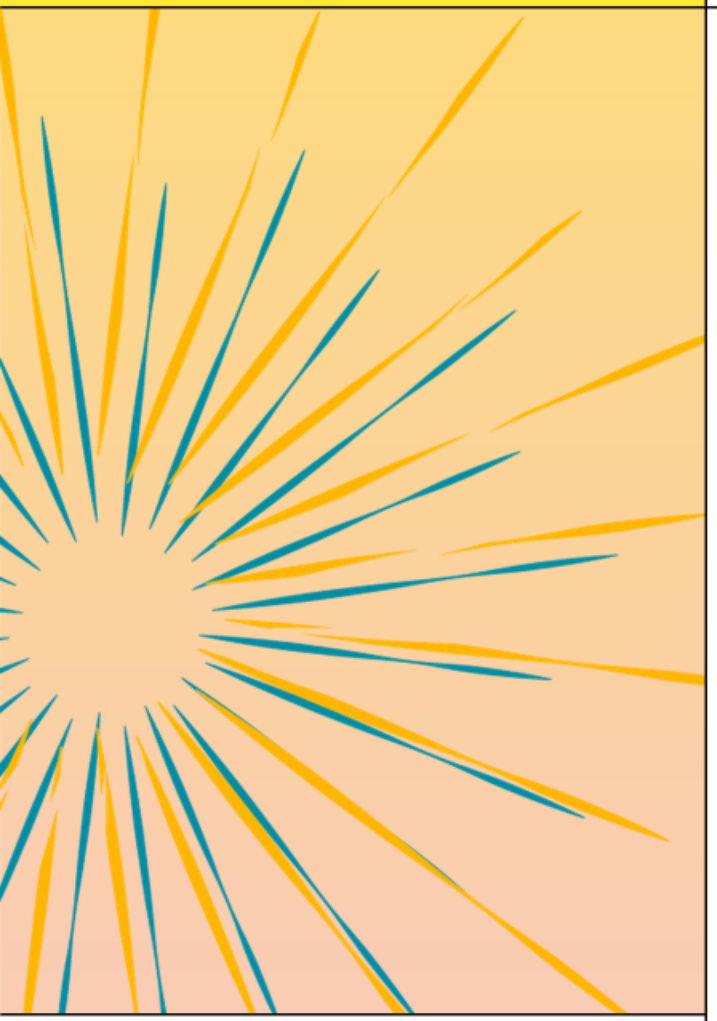
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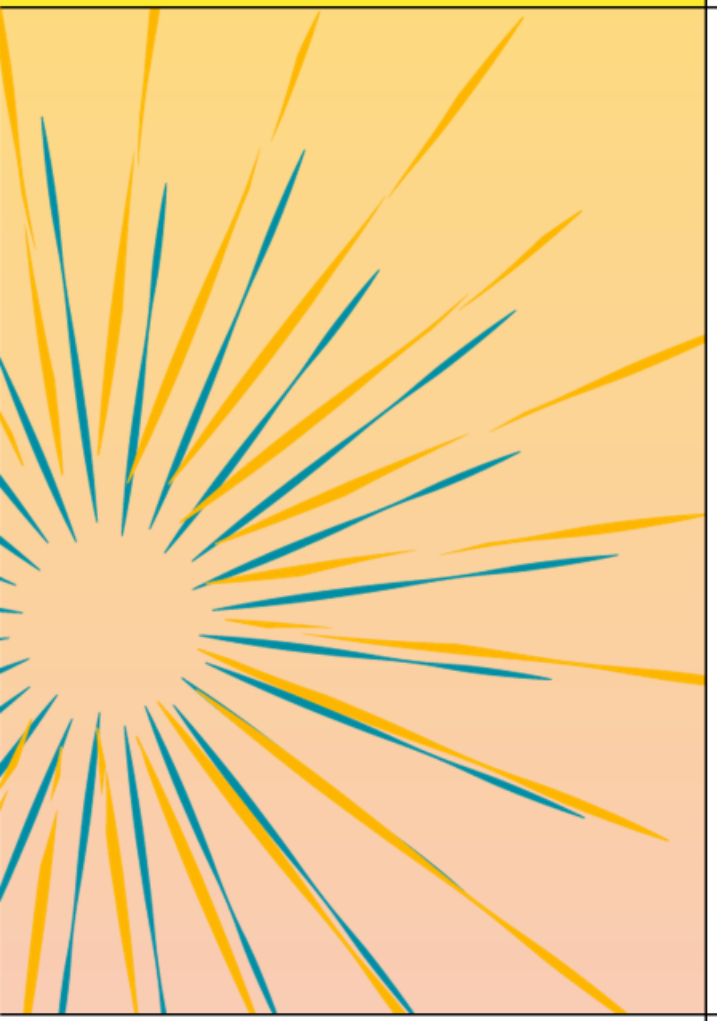
Charity Excellence Framework

Queer Trustees

Trustees' Week

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Chair	**Kemi Olafare**, Director of Finance, UCL Partners; Former trustee, Faces in Focus
Panellists	**Alice Clementi**, Co-Founder & CEO, Charterpath; School Governor, St Mary's School Ascot
	Sarah Ann Moore, Director of Finance & Operations, Charity Finance Group; Chair, Edgbaston Priory Club; Trustee, Empower Squash Foundation; Board member, Lisieux Trust
	Inno van den Berg, Partner, Evelyn Partners; Trustee, Sisters Of Our Lady Of The Missions
	Krystle McGilvery, Co-Founder, Beam Culture; Trustee, Abianda

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Money matters:
10 questions every trustee should ask.



Festival of Trusteeship · Supported by Evelyn Partners

Charterpath

Your hosts today.



Kemi Olafare

Director of Finance,
UCL Partners



Alice Clementi

Chief Everything Officer,
Charterpath

Charterpath

Opening poll: who’s in the room?

When it comes to charity finances, which best describes you?

A I’m pretty sure I know what I’m doing.

B I understand some of it, but leave the detail to others.

C The finance report might as well be in another language.

Charterpath

Opening poll: who's in the room?

And are you…

A Charity staff / work with trustees

B A current trustee or volunteer

C An aspiring trustee or volunteer

C Still undecided about this volunteering thing

Charterpath

“You don’t need to be an accountant.
You do need to know what questions to ask.”

Charterpath

Theme 1 · Questions 1–4

Understand the finances.



Charterpath

Question 1

Who’s actually responsible for our Finances?

Every trustee shares responsibility for the finances, not just the Treasurer.



Charterpath

Question 2

Are we looking at the right numbers, or just lots of numbers?

Clear, current and know what you are aiming for.



Charterpath

Quick poll

Are you happy with the financial information your board receives?

A Yes, it’s great

B Could be better

C It definitely needs work

Charterpath

Question 3

What are restricted funds… and are we accidentally spending them?



Restricted means restricted, even when another use seems worthwhile.

Charterpath

Quick poll

Does your organisation know its stuff on restricted funds?

A Yes

B No

C No idea

Charterpath

Question 4

Would the tax man be happy with us?

VAT, Gift Aid and payroll: are our records and claims robust?



Charterpath

Theme 2 · Questions 5–7

Protect your assets.



Charterpath

Question 5

Are we looking after our assets sensibly?

Investments, property and kit: sensible, recorded and insured?



Charterpath

Quick poll

Do you have someone with investment expertise on your board?

A Yes

B No – we could do with one

C No – we don’t have enough cash to invest

Charterpath

Question 6

How many people can access the bank account… and should I be worried?

Who can make, approve and check payments?



Charterpath

Question 7

How happy is our Treasurer really?

Is one person carrying too much, without the support they need?



Charterpath

Theme 3 · Questions 8–10

Plan for the unexpected.



Charterpath

Question 8

Are we living in the real world?

Taxes, energy costs and demand: are our forecasts realistic?



Charterpath

Quick poll

Are you clear on how the latest Budget will affect charities?

A Yes

B No

C Not sure

Charterpath

Question 9

Could we survive a funding shock?

A lost grant or a departing donor: what's the plan?



Charterpath

Question 10

If our Treasurer disappeared tomorrow, would anyone know how anything works?



Write it down and plan the handover now.

Charterpath

Over to our panel.



Inno van den Berg

Partner, Evelyn Partners



Krystle McGilvery

Chartered Accountant and money & behaviour specialist



Sarah Ann Moore

Chartered Accountant and trustee, CFG

Charterpath

Which three belong on your next board agenda?

1 Responsibilities

2 Reporting (the right numbers)

3 Restricted funds

4 The tax man

5 Looking after assets

6 Bank access

7 A happy Treasurer

8 The real world

9 A funding shock

10 If the Treasurer vanished

Charterpath

Thank you.

Go ask those questions!

Charterpath

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The Festival of Trusteeship 2026

Thanks for joining us

Charity Trustee Hub: The one-stop shop for resources, events, and top tips for charity trustees.

https://bit.ly/4yY9Rtv

Charity Crisis Checklist: Why does a charity need a crisis checklist and what should be in it?

https://bit.ly/4e5o4gY

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