



Chartered Accountants' Trustees Ltd

GUIDANCE ON FUNDING OF CONFERENCES/SEMINARS/WORKSHOPS

The ICAEW's charitable trusts are able to offer funding for academic events relating to accounting, economics and business topics.

Below are guidelines on applying for funding. All applications should be made by completing the application form which should be submitted to Gillian Knight, Research Manager, ICAEW. For more information contact Gillian on +44 (0)20 7920 8478 or by email at gillian.knight@icaew.com.

WHAT TYPE OF EVENTS QUALIFY FOR FUNDING?

The charitable status of the trusts means that only events which are in the public interest will be considered for funding (this can include the interest of ICAEW members and the accounting profession). ICAEW is keen to promote research and debate in a wide range of areas, particularly topics which relate to its thought leadership programmes. These include topics such as audit, corporate governance, financial reporting, financial services and tax. Please see www.icaew.com/thoughtleadership for full details of each of these initiatives.

ICAEW will consider any non-commercial events that fall either within these areas or other related areas such as the public sector and will also consider funding of events covering historical finance and accounting issues. Funding requests are welcome for events which consider leading-edge issues affecting the accounting profession and which bring together academics, practitioners, regulators and senior business figures to debate such issues.

Funding is only available to essentially non-commercial organisations where such events would be unlikely to take place without external funding.

WHERE DOES THE FUNDING COME FROM?

The funding comes from the charitable trusts associated with the Institute of Chartered Accountants in England & Wales which support educational projects relating to accountancy and economics.

WHAT CAN THE FUNDING BE USED FOR?

Costs should be kept to a minimum, particularly in the areas of catering and accommodation. We do not pay speaker fees but will consider covering economy class travel only and accommodation for both speakers and attendees if they would not be expected or able to cover these expenses themselves.

Other costs may include publicity, design costs, signage, conference wallets, handouts and name badges.

The application form gives possible costs you may wish to claim for. Not all will be appropriate, please amend or add to the list as necessary.

We will reimburse actual costs related to the event which are in accordance with the original application, once they have been incurred.

CLAIMING FUNDING

We only pay actual costs incurred. If costs are less than originally envisaged then this must be reflected in the final claim.

You should make your claim as soon as the event has taken place and you must provide a detailed breakdown of how the money was spent. We cannot make VAT payments in addition to the amount originally requested and agreed. If you envisage additional VAT payments then make sure this is accounted for within the initial application. Please send your invoice to Gillian Knight at gillian.knight@icaew.com

HOW LONG WILL IT TAKE TO PROCESS MY APPLICATION?

We hope to be able to process event funding applications within two months depending on when the trustees will be meeting. Although the Research Advisory Board makes initial assessments on funding, all applications then go through to our trustees who make the final decision on funding. We recommend that you apply for funding well in advance of the actual event.

IF FUNDING IS GRANTED, HOW SHOULD I ACKNOWLEDGE THE SOURCE OF FUNDING?

We like to ensure that the ICAEW's charitable trusts are featured prominently as financial supporters of the event. We will supply you with the correct wording to use to acknowledge the ICAEW's charitable trusts and also with the ICAEW's charitable trusts logo.

IS ANYONE FROM THE ICAEW LIKELY TO ATTEND THE EVENT?

We encourage ICAEW staff to attend such events in order to build good working relationships between ICAEW staff and academia, to encourage awareness of academic research and allow staff to contribute to relevant events. We are also pleased to discuss other opportunities for actively participating in the event, eg by providing a panellist or keynote speaker.

OPPORTUNITIES FOR PARTICIPATION

We are happy to hear from the event organisers about any opportunities for displaying or circulating literature at the event or any other suggestions for ways in which the ICAEW might actively participate.