

Harris Lacey and Swain

CHARTERED ACCOUNTANTS



**CASE TRAINING:
HERE FOR YOU THROUGH THE GOOD TIMES
AND COVID**

case 
improving lives



CHARITY ACCOUNTING CASE STUDY ABOUT CASE TRAINING LTD

It is rare for accountants to develop an emotional attachment to a client. Though we do get heavily invested in what our clients do and how we can make their working lives easier – and while we do truly care about each one of them – the relationship remains professional and business-like, as do our feelings, throughout the months and years we work with them. While it is rare to develop an emotional attachment to a client, it is perfectly possible.





MEET CASE, A CHARITY PROVIDING PRACTICAL SUPPORT TO THOSE WITH LEARNING DIFFICULTIES

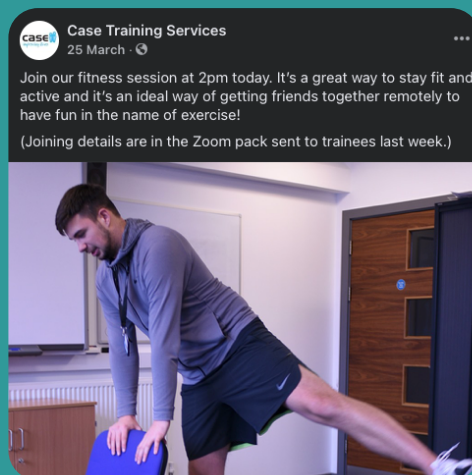
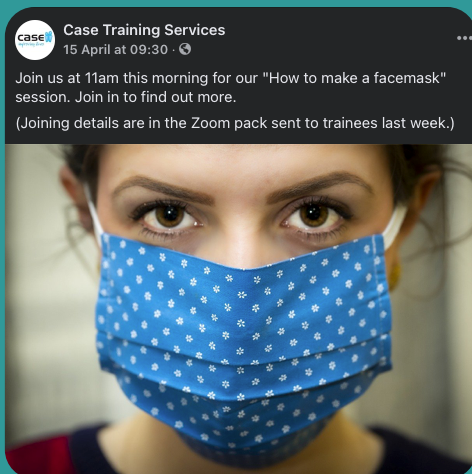
Fifteen years ago, Harris Lacey and Swain of Hessle began providing services to a charitable organisation called CASE Training. CASE is a support network of trainees who provide daily learning, personal development, and social activities to adults living with a learning disability. Many of them have identified that their disabilities inhibit their rights to live, work, and socialise independently – and CASE is the organisation giving them accessible steps to turn that around.

Until CASE, we had never before met a small charity with such an enormous output – they are so much more than a fundraiser and a voice of awareness, two things you'd usually expect of a charitable organisation. CASE is an integral part of these motivated, unique, life-loving, and wonderful peoples' routines.

CASE: SURVIVING & THRIVING THROUGH COVID

When Covid first became known in early 2020, we all became concerned with the condition of our mental health and how we would muddle through the months of national lockdown without the support of our friends, families, and health workers. This has been especially difficult for those with pre-existing physical and mental health conditions. Mark Cooke, who has been General Manager for CASE throughout the last year, told me: "We were a big part of their daily routine before Covid existed, and we knew we needed to fight to provide continued services for them throughout the pandemic, too".

Although CASE's team have worked a certain way for the past 35 years, they managed to adapt quickly through Covid. We learned from Mark that: "Individuals are provided with either a home learning pack or regular Zoom calls, along with a weekly `welfare support call` to check how they are, if they've managed to shop for food, etc. While it's working for our individuals thus far, we are eager to reopen our centre and to resume a sense of normality for families we work with. Plus – we've got our annual ball, winter wonderland, and Christmas panto to plan!".



HOW HARRIS LACEY AND SWAIN HELPED CASE TRAINING LTD

Mark Cooke, General Manager of CASE has been working with Richard Lacey of Harris Lacey and Swain - for 5 years. Mark has commented on the following services provided and results achieved by Harris Lacey and Swain thus far:

1. HLAS provides charity accounting services to CASE;
2. Along with payroll services via Sage (which has helped streamline their finance department);
3. Along with charity auditing services – a requirement for some charitable organisations exceeding the threshold of annual income and gross assets given by the charity commission; [link to charity audit blog for more info]
4. Richard advises the board of trustees to offer up-to-date advice as per the charity commission's guidelines, which would otherwise be an inaccessible expense for CASE;
5. Along with ad-hoc financial advice to CASE whenever they need it;
6. Along with advice on what we can afford to spend money on;

[Read more about Harris Lacey and Swain's charity accounting services here.](#)

Mark added: "Richard and his team at Harris Lacey and Swain are so much more than accountants to us. They have a vast amount of experience, they're passionate, and they always have an answer, especially Richard as he's always been my port of call. And if he doesn't know the answer to my question, he'll find somebody who does. The best part? Despite how much they do for us, Harris Lacey and Swain are so very humble about it. If you are a charity, big or small, and you need help with your accounts, payroll, and audits – I'd recommend Harris Lacey and Swain in a heartbeat. They're an absolute godsend and we wouldn't be without them now".

