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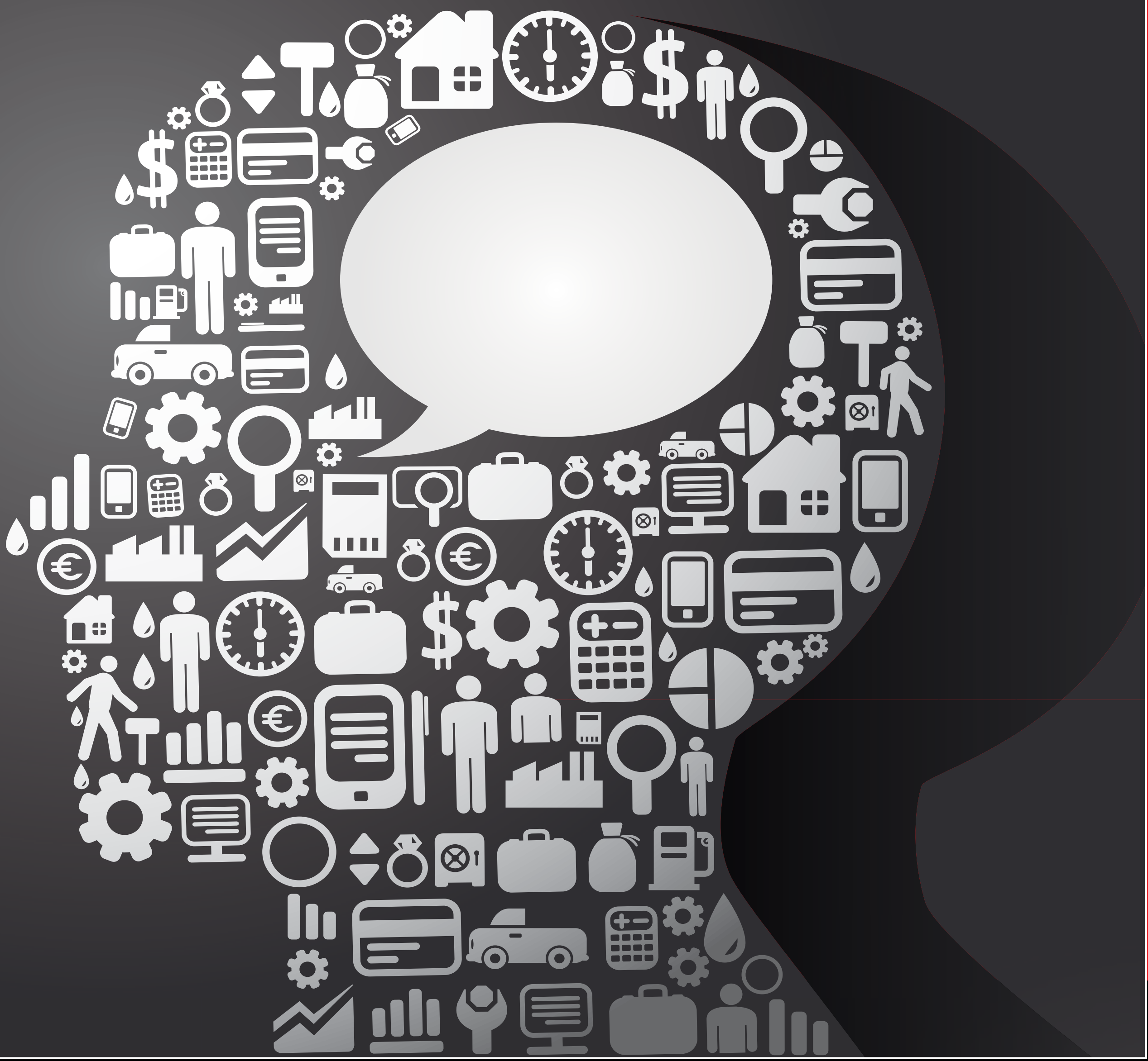
Management Guide 2016



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Contents:

Must haves:
The social value of investing in leadership

Why taking the time and the space to improve should be at the top of every leader's to do list

'We don't do leadership development' said one CEO of a well-loved charity to me. 'I can't justify it, I don't learn anything and it's mostly bullshit.' Fair enough: we have all been turned off by this or that huckster running 'leadershit' courses as they have in some quarters become known. Interminable seminars about 'leaning in' , 'finding the better you', or 'winning friends and influencing people.' Second rate public intellectuals or over-the-hill Olympic athletes who interrupt a perfectly good conversation over a perfectly serviceable coffee to give you the benefit of their wisdom about 'pushing for the burn' or 'looking into their team mates' eyes.' Leadership development: a relic of an era of plenty where charities and their heads played at being corporations. Good riddance to all of that.

That perhaps, was the way it was, or the caricature of it. But it is certainly not how it is or should be considered now. And the case I want to make today is twofold. First, that leadership development is changing and becoming more vital in its best form than ever before. Secondly, that it is worth any charity CEO's time considering the leadership development that they need to achieve the things they want to achieve – and taking the plunge.

It is a sad fact that investing in leadership development can be just about impossible to justify for charity leaders, especially in an absurdly tight financial climate. Leaders are required to tangibly 'prove' the value of their disbursements. Boards are edgy. Leadership development involves investment in the head or senior staff of the organisation, so it is said, at the expense of the more junior staff, or indeed the beneficiaries. Charity chief executives are open to enough criticism without adding spurious training to the list of items on that apocryphal expense account. And trustees just do not wish to go there.

But this is almost certainly a case of 'penny wise pound foolish.' For investing in strong and effective leadership benefits more than just the individual. Part of the journey may be to learn about oneself. This may seem nebulous at first, sure, but part of the development an individual needs may focus on quite tangible skills. For example good management and development of staff, finding and building client relationships and collective leadership across the sector. And alongside those tangible skills, perhaps sitting through some of the more nebulous stuff will actually allow the individual to do all those other things that much better, to focus and apply the mind - and to build personal reserves and resilience.

This goes to the heart of what it means to lead a socially minded organisation today. The challenge to all leaders today is to make things happen, and bring people with them, in a world that is more networked, faster-changing and more uncertain than ever before. Leaders are having to learn soft influencing and subtle collaborative skills that enable them to work for, with and through partners, to listen to their staff, appreciate them and develop their skills rather than simply ordering or directing them. More than ever, as we understand the interdependent nature of social change. More than ever, leaders are not respected as charismatic juggernauts. They are having to learn to 'let go,' to be humble and to understand the limits of the possible. This can be hard for people whose personal vision, drive and impatience has got them where they are – or for those who have served their leadership apprenticeship alongside the proverbial 'force of nature' of another generation. The truth is: to imitate, ape or uphold this fiction is to build one's leadership on sand.

Resilience is also at a premium. Acevo, the organisation I lead, is the UK's leading network for charity and social enterprise leaders. We run a 'CEO in crisis line' for every one of our members, for times when things get too much. It has become a key resource and in some ways, while I am beyond proud of the work my team does to support our members, I am sad that increasingly things are coming to this. The support and legal help we offer are increasingly crucial at a time when from a governance and infrastructure perspective, charities are against the wall. For charity leaders, these challenges are magnified by uncertainty over income, by changes to the funding base and the need for diversification, and by tensions that can arise between the mission and values of one's enterprise and the priorities of funders. All of these things can be punishing, not only professionally but personally as well.

It is lonely at the top. Leading is always in part a solitary meditation, especially in charities without the resources enjoyed by larger counterparts in this sector or in others. And the extant attitudes in our sector mean that charity and social enterprise leaders whose development has been restricted to the sector are more likely to have missed out on the systematic approaches to personal and career development that are well established in public and commercial worlds. That is the reality, not only of limited funding, but of seeing training and personal development as a 'nice to have' or worse a distraction from the core mission.

We love our charity and social enterprise leaders. They are typically passionate, enquiring, vocal, innovative and resourceful, challengers of the status quo. All qualities that mark out the leaders who get things moving and people motivated and so make a difference. At Acevo we are at our best when we provide and nurture the networks that provide vital support, learning and encouragement to these makers of social good; these interpreters (to paraphrase football coach and personal developer extraordinaire Arsene Wenger) of what is beautiful about mankind.

The case for investments in leadership development when made properly are not about individual aggrandisement but about investing in outcomes of the whole. Leadership investment is not 'taking money away' from a cause but building the vital personal resources that enable charities to best serve their missions.

At a time when public goodwill is increasingly reserved for organisations that not only help others but that also are 'good' in every respect of their operation, charities that prove their worth as investors in their people should become not the exception but the norm. Of course, none of this applies when vast expenditures are lavished on dud courses. And no amount of training can take the place of engaging with beneficiaries and employees, doing well and making mistakes, out there, in the field. But taking the time and the space to improve, not only your skills, but yourselves, should be top of the list of every leader. And for every leader that needs a helping hand filtering out all of the stuff that's out there: well that's where organisations like Acevo and more importantly the 1,400 likeminded peer leaders that populate our network come in. Our members, your peers, give you the best advice you will get anywhere. Yes, it is lonely at the top, but together we can make it that much less lonely. And the view will be all the better for it.

Asheem Singh is acting chief executive of Acevo

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Charity Leaders Network

Building better, more effective charities

How reflecting on impact measurement can change the way charities work

Sometimes at NPC we bring together people from a single charity, and ask them to tell us about their organisation.

Part of our consultancy work is to get charities thinking about the essentials. Do they have a shared vision of what they want to achieve, and a plan for getting there? What changes do they want to make to society over the next week, year or decade? Can they measure the impact they are having, with an eye to improving it?

Some senior teams debate these things reasonably often. We also find — less often but more memorably — that these conversations can uncover strikingly different assumptions about the values and fundamental mission of their charity.

One thing above all emerges clearly. You aren't likely to see much lasting change without a united leadership team, especially at large charities where there are so many priorities to juggle and stakeholders to keep happy. The chief executive needs to buy into the ideas, and senior managers need to be committed to following them through with their own staff. Without this, even carefully laid plans aren't likely to lead anywhere.

So how can teams deliver on their mission? Part of the answer is knowing what you have achieved, and using this to inform what you do next.

NPC knows as well as anyone that impact measurement can be driven, in the first instance at least, by funders' demands. More than half the charities we surveyed in 2013 conceded this; barely 5% said it was to improve services (which is, after all, the point).

The good news is that this seems to be changing. Charities are doing serious work on impact measurement, and are starting to place it at the heart of their strategic plans. For those of us who care deeply about charities being as effective as possible, and indeed talk about it for a living, this is very welcome indeed.

So we are doing more to learn about how reflecting on impact measurement can change the way charities work. Once the data has been collected and the projects evaluated — and, yes, the information shared with funders — how does it inform the way the organisation works? This data could be used for developing promising pilots, tweaking established services to work better for beneficiaries, identifying what is ripe for scaling-up to reach more people, and (occasionally) what should be ditched because it isn't as effective as hoped.

Impact should provoke plenty of challenging conversations. It should be a rolling process, from which charities are constantly learning and reacting.

Lots of management teams get that this is ultimately the reason that it's worth investing so much time integrating impact work into their day-to-day planning. The key thing is to help them make it into a reality.

There is progress beyond this, too, although it is still in its infancy. Once a number of charities working in a similar field are conducting high-quality evaluations, they can start bringing all these together to pool their knowledge.

Here, too, leadership is crucial. A single chief executive trying to steer his or her charity through rough waters is quite enough, without adding some rather techy, high-level co-ordination on top of it. Co-ordination works best where several forward-looking leaders recognise the benefits of working collectively — for their organisation and for the sector of which they are part.

In recent months we have seen these sorts of coalitions built, and very effectively. NPC's *Untapped potential* report on health charities and the NHS, published in May, resulted from the Richmond Group and partners — fifteen top health charities along with Public Health England — getting together to look at all of their evaluations of a whole range of programmes.

These charities are looking not only at their own impact, but comparing notes to make the case for extending the most effective services to more beneficiaries. This approach meant the voluntary sector had collective clout to show where charities had helped the NHS, and can contribute to re-shaping the health system for the future.

This may be possible only for the largest charities, but it shows how far it gets you to engage fully with impact. It can build better, more effective charities, and a stronger, more coordinated sector, which is what we should all be after.

Sally Bagwell is Deputy Head of the Charities Team at NPC

NPC
New Philanthropy Capital

A guide to finance system technology

You've more choice than ever when it comes to the technology your organisation uses. But how can you be sure you're getting what you really need?

It's important to know more about what's going on behind the scenes when choosing a system to ensure it can meet your requirements. After all, who knows what your department needs better than you?

Cloud vs on-premise

Software used to be 'on-premise'; installed and run on computers on your physical network. But recently more organisations are turning to the Cloud to access the software.

So which to choose? On-premise may seem the easy option, giving you in-house control over the systems and data and bringing simple, tangible security. But these days, with developments in Cloud security, your data could be more secure there. With on-premise, you'll also benefit from in-house IT support staff. But realistically, how much of their resource will end up coming your way? With Cloud, the very people building the system manage it, so it's far less likely to go wrong. And if it does, who better to resolve things? Plus, they typically have one system to look after, unlike your internal tech team.

Then there's the investment. IT can be expensive, and new on-premise solutions can seem a pricey initial investment, which is why Cloud is such an appealing option to some. Little or no upfront investment is required and you only pay for what you use, meaning you can add or remove features as and when you need to.

So make sure your providers give you both Cloud and on-premise options. There's no right or wrong choice, but the fact you have a choice in the matter means you can tailor the solution to your needs.

Behind the scenes

Back-end technology is an important, commonly overlooked factor in choosing a system. When looking at on-premise solutions you'd naturally ensure it fits in with your current architecture. So carry out the same checks for Cloud solutions.

One aspect to consider is whether the finance system is able to share data with the rest of your organisation's systems. Interoperability is increasingly important for today's organisations, so ensure you ask your provider if this is achievable with any of your other chosen software.

Something else to think about is the underlying database. The two most popular are Oracle and Microsoft SQL Server. But which is going to suit your needs best?

If you're after flexibility, then find out the tools the supplier uses. With SQL Server you are limited (to a degree) to Microsoft tools, but with Oracle there is more choice and scope, giving you an end product with more options in functionality and design.

However, one common criticism is that Oracle is too specialised for the average in-house IT team. Well, in our experience you can get an Oracle database up and running just as quickly as SQL Server. But where Oracle comes into its own is in its complexity. At the highest level it's just as easy to look after as other databases, but it has better automated management tools that constantly monitor and tune the system, so the front end of your finance software operates smoothly allowing you to focus on your day job. This is why it's a popular choice when it comes to moving to the Cloud.

However it's all about you and personalising your platform for your organisation.

Pay for what you use

"But Oracle is so expensive" is another criticism. Yes, if you are running it on large environments. However, if you're working on-premise, an embedded software licence would allow you to use all the functionality and power of an Oracle backend database but at a fraction of the cost should you only need it for one application. But if your organisation needs Oracle for multiple systems, then a full license is probably the way to go.

A cloud-hosted system means you latch on to the supplier's license and so the cost is spread across your cloud provider's customers meaning you only pay for a fraction of the cost.

There is far more choice than ever before, so whatever you sign up for, make sure it's scalable, reliable, able to talk to your other systems and affordable with no hidden costs.

Ask about the technology each supplier uses and why, ensuring you're getting the best for your organisation.

Nicky Wilkins is Head of Customer Engagement, BluQube

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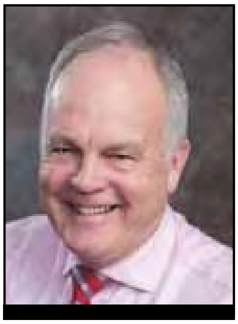
Is your charity making a good job of employment law?

It's all too easy for charities to trip up over the complex business of Employment Practices Liability. Richard Lane explains why – and what you can do about it



In many ways, a charity is a business like any other. The moment you engage directors and staff, you enter the complex and ever-changing world of employment law. Everything from paternity leave to harassment needs to be scrupulously managed. For charities, having trustees and volunteers in the mix adds an extra twist.

Woe betide the organisation that gets its employment practices wrong. While most people know little about areas of law like conveyancing and probate, they tend to be much more clued up about their rights as an employee. Which means you can end up in litigation faster than you can say discrimination grievance.

The consequences for your charity can be costly and time consuming. And not just in staff time and legal fees. Being dragged through courts, tribunals and the press can damage your reputation and have a knock-on effect on donation income. If it's serious enough, the future of the organisation could even be at risk.

So what can you do?

A good first step is to make sure every employee understands their role, the terms of their contract and what's expected of them, right from the word go. It pays to invest in clear contracts and policies, expert training and a comprehensive handbook that covers everything they need to know.

Never assume. For instance, it may seem obvious to you what discrimination is. But if it happens in your organisation and nothing has been done to define and prevent it, your charity may find itself on the wrong side of a claim. On the other hand, if your staff and volunteers have been trained to understand exactly what's acceptable in the workplace and what isn't, you have happier people – and a stronger defence if things go wrong.

Proper training goes a long way when it comes to prevention, especially for sensitive areas such as whistleblowing. The law protects employees who speak out to expose what they see as wrongdoing. Once the issue has been raised, it's vital the employee isn't penalised for having done so or more legal action can follow. Staff need to be very clear about how to navigate potential minefields like this.

It's a question of good practice

Having strong HR practices in place is essential. It's also important to have a system for dealing with any disputes quickly and effectively.

It's not unheard of for trustees to claim against each other over a dispute in the boardroom. With a good internal dispute handling system in place, you can prevent issues escalating and ending up in court – and the public eye.

It's worth remembering that if donors become aware of damaging claims against your charity the fallout for your reputation could discourage further donations. So you could be dealing with double trouble. Which brings me to my third tip…

The sooner the better

Getting good HR and legal advice early on can save a great deal of heartache and money. Small charities are especially at risk: with smaller, fragile budgets, HR is often the last thing they add or the first thing to go.

This can prove a false economy. The task of managing a charity's workforce is a complex one; there are often staff, volunteers and trustees, each with their own rights and needs. It can be a real minefield.

If you can't afford to have the expertise you need to manage employment issues in-house, it pays to outsource. Experts can help you get the HR systems you need in place – and provide legal guidance if things go wrong, to help prevent a situation escalating.

You might also want to consider employment practices liability insurance to help cover the legal costs of handling employee grievances. A good specialist broker can advise you on the best choice for your needs.

It's easy to let employment practices slide when you're focused on the pressing job of pursuing your charity's mission. But it's worth the investment. A sound and happy ship is much better at weathering storms.

Richard Lane is Managing Director of Ansvar Insurance

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CC14 made simple

A practical guide

We are often asked what is the difference between investment management for charities and other types of investors? In simple terms the differences are probably time horizon and the governance framework around investing for charities. Trustees' and charities' responsibilities regarding investment are encapsulated in the Charity Commission guidance *Charities and investment matters: a guide for trustees (CC14)* which for expediency we will refer to as CC14.

CC14 may not be known for its brevity – it is 56 pages long – but it provides a comprehensive guide to charity investment and provides trustees and investment managers with a clear framework as to their responsibilities. For trustees who are experts in the field in which the charity operates and who are responsible for making decisions about their charity's investments, CC14 is a useful handbook as they are seldom also investment experts.

CC14 notes that so long as trustees have 'considered the relevant issues, taken advice where appropriate and reached a reasonable decision, they are unlikely to be criticised for their decisions or adopting a particular investment policy'. CC14 sets out a number of legal requirements for charities, as well as recommendations. What follows is a pragmatic guide (not a legal one) to these requirements.

Know, and act within, their charity's powers to invest
Understand what the charity's governing documents allow you to do. In some more historic documents there may be significant restrictions on the types of investments permitted.

Exercise care and skill when making investment decisions
The trustees may delegate day-to-day management for the investments to another party however they retain overall responsibility for the charity's investments. Ultimately it comes down to 1) do you have all the right information? This is probably a result of knowing what questions you should be asking (see section 6.4 of CC14), and 2) what may be the right investment solution for your personal portfolio or pension pot may not be the right one for the charity.

Take account of the need to diversify investments
This does not necessarily mean appointing different investment managers (depending on how different their investment approaches are, you may not be diversifying at all); but it does mean having a spread of investments. Previous Charity Commission advice was that no more than 5% of a portfolio should be in one holding (this usually excluded government issued bonds, and diversified pooled funds); for many charities this remains apposite.

Take advice from someone experienced in investment matters unless they have good reason for not doing so
The trustees may wish to appoint an investment manager who provides advice or an investment adviser; equally there may be sufficient knowledge on the board through its trustees or co-opted members to meet this requirement. Whatever the case, the trustees should ensure that they have sufficient knowledge to constructively question decisions and that any advice they are being given is impartial.

Follow certain legal requirements if they are going to use someone to manage investments on their behalf
If you appoint an investment manager or another type of adviser there should be a contract detailing the relationship. There should be a written investment policy in which it is useful to include what the investments are actually for simply as a reminder of the original purpose of the investments.

Review investments from time to time
This is sometimes interpreted as 'every x number of years we must have a beauty parade to see how our current manager(s) compare to the industry'. This process involves whittling down a long list of potential managers to a short list of managers who are invited to come and 'pitch' for the business. In a number of these instances the trustees are reasonably happy with the incumbent manager and feel they have to go through this full blown process to meet this legal requirement. This is not really the case; 'review investments from time to time' is defined in CC14 as:

- Measuring investment performance
- Deciding who should conduct the review [of the investment performance]
- Reviewing the service offered by the investment manager
- Frequency of reviews
- Criteria for intervening

There is no mention of a full formal review here – it is perfectly possible to conduct a full review of investment manager performance without resorting to a full blown 'beauty parade' which can be time-consuming. But if there are significant concerns or unease with an investment manager then this is where the 'criteria for intervening' are important.

Explain their investment policy (if they have one) in the trustees' annual report

This does not have to be *War and Peace*, or the full SIP. A few simple sentences outlining what the objective is for the investments and how that is being implemented cover this. There should also be a statement regarding the performance of the investments (does not have to be the actual returns) and if any ethical policy has been adopted and how this is interpreted.

Equally CC14 provides clear guidance as to what should be included within a charity's statement of investment policy (SIP) and indeed when a charity is legally required to have an investment policy (i.e. when the charity has appointed an investment manager on a discretionary basis), it is also best practice that a charity have a SIP no matter what arrangement it has in place. In our view the SIP is a very good home for the 'must have' (i.e. legal requirements) and the 'should have' (best practice) requirements of CC14.

Apart from the legal requirements, CC14 provides helpful pointers on a number of other issues including ethical investment which for many charities remains one of the most interesting questions – should an ethical policy be adopted? Or if a policy is in place – is this the right ethical policy?

CC14 is very clear about the circumstances when trustees may adopt an ethical policy (and reinforces the findings of the 1991 Bishop of Oxford versus the Church Commissioners legal case) i.e. when one (or more) of the following criteria are met:

- a particular investment conflicts with the aims of the charity
- the charity might lose supporters or beneficiaries if it does not invest ethically
- there is no significant financial detriment

All in all CC14 provides a very helpful framework for charities with investments to guide them through potential issues to ensure that they have 'considered the relevant issues, taken advice where appropriate and reached a reasonable decision', and therefore that 'they are unlikely to be criticised for their decisions or adopting a particular investment policy'.

Gemma Woodward is Executive Director at Quilter Cheviot

QUILTER CHEVIOT

INVESTMENT MANAGEMENT

What the public thinks about charities

How the sector should respond to the change in public perception of charities

The media storm charities have faced over the past year has touched on many aspects of how modern charities work. We've seen critical articles about fundraising practices, CEO pay, and admin costs, and the scrutiny is far from over.

The result of all of the coverage has been to focus attention on charities as institutions and how they work, rather than on their role in and benefit to society.

The slew of negative stories about the sector has had an effect on the public's trust and confidence in charities. I've been working with the Understanding Charities Group, a cross-sector coalition working to ensure that the public values charities and their contribution to society by increasing trust, confidence, knowledge and understanding of the sector.

Earlier this year, we undertook focus group research with both charity and non-charity supporters to explore the public's feelings about charities today and to understand how and to what extent negative media coverage has cut through to the public. The research revealed some key insights.

1) The trust issue is real and must be addressed

Charities are felt to have become too corporate - advertising spend and CEO pay were used as examples of this - and are not transparent about how donations are spent. Almost everyone could cite an experience of aggressive fundraising techniques, and there was particular concern about the effect of these on elderly or vulnerable friends and family. There was a sense of nostalgia for 'the good old days', when charity was felt to be simpler, more local and more fun. Crucially, too, charity supporters are more frustrated than non-supporters, and more likely to be critical.

2) Media coverage is confirming concerns, not creating them

The media are seen to be exposing bad practice, with charities ultimately to blame. People's underlying suspicions about charities are brought to the fore as the stories are frequently resonating with their own negative experiences.

3) You can't fix the reality by talking about the ideal

The negative stories about charities are being received in a vacuum, with nothing about the positive impact of the sector to balance it out. However, unless people's concerns are addressed, they won't engage with a positive narrative about the sector. The sector needs to change its behaviour, and people need to experience this change.

4) Communicating collective impact is essential to restoring trust

The desire to understand how charities spend donations is actually an expression of a deep underlying concern – people don't really know if their donations are doing any good. While supporters talked passionately about individual charities they had personal connections with – usually through experience of the cause for themselves or a close friend or relative – there was a lack of understanding of the wider part charities play within society. Charities need to find a way to quantify and communicate their collective impact.

These insights have informed the development of a cross-sector narrative which aims to tell a more positive story. It's a story about people making the difference: and how charities harness people's goodwill and combine it with professional expertise and vision to create the biggest possible impact.

It focuses on the impact and benefit of charity, and less on the organisations; how we are all touched by and benefit from it. And it encourages the feeling that giving time, voice and money for social good, is a good, rewarding feeling.

The Understanding Charities Group work is being taken forward by bodies like NCVO, Acevo, CharityComms and the Institute of Fundraising, with the input and support of a range of charities. Next steps include creating a communications toolkit to give charity spokespeople the confidence to speak to the media on behalf of the sector. It will include a Q&A to help charities answer key questions on fundraising, governance and salaries.

Meanwhile, a website is being created to explain how charities work, and initiatives are being developed to encourage more positive stories about charities in the media.

Through understanding better what the public thinks about modern charities, and working collaboratively across the sector, we hope to be able to help people feel confident in the way charities work and inspired by what we achieve.

Vicky Browning is director of CharityComms

CharityComms

Ansvar

Ansvar have a long history of working with small charities and not-for-profit organisations and is one of the UK's leading charity insurers, with a range of specialist commercial policies. Each year we donate a share of our profits to charities involved in alcohol and drug education and rehabilitation, particularly for young people.

We were extremely proud to have been named Insurance Company of the Year at the Better Society Awards in 2015; fantastic recognition of our commitment to the charity sector.

If we don't already insure your charity, we hope to have the chance to do so in the future. For more information about our policies please go to www.ansvar.co.uk

Contact Details

Ansvar Insurance
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BluQube

We believe there is a better way to do things, that software should be adaptable, intuitive to use and be tailored to your organisation's needs. For instance, giving people across departments access to the software in a self-service capacity, reducing bottle necks for your finance team.

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Contact Details:

The Hophouse
The Old Brewery Business Park
7-11 Lodway
Pill
BS20 0DH

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