

## Agenda

**08:30 - 09:00 Registration and refreshments**

**09:00 - 09:05 Chairman's opening remarks**

**Matt Ritchie, Editor, Charity Times**

**09:05 - 09:30 Morning keynote session**

**Paula Sussex, Chief Executive Officer, Charity Commission**

An overview of the Charity Commission's soon to be launched digital services, and an opportunity to put questions to the regulator's chief executive.

**09:30 - 09:55 Ethical fundraising - are we making progress?**

**Stephen Dunmore, Chief Executive, Fundraising Regulator**

The role of the Fundraising Regulator, the levy, registration and the sector's response – the good, the bad and the naïve.

Making fundraising better – the Fundraising Preference Service, investigations and adjudications, updating the Code of Fundraising Practice, culture not rules.

- Data protection and consents – the big ticket issue?
- Regulation, neither enemy nor friend – collaboration, confidence and independence.

**09:55 - 10:20 Governance**

**Louise Thomson, Head of Policy (Not-for-Profit), ICASA**

Governance is currently a hot topic, with both the business and charity worlds looking at whether governance standards are currently fit for purpose.

With the Law Commission due to report on charity law and regulation and a new charity governance code anticipated soon, trustees and managers need to be up to speed with the direction of travel. Louise will cover key aspects of governance developments and highlight those areas that might require the attention of trustees and their senior management team.

**10:20 - 10:50 Coffee Break**

**10:50 - 11:15 Putting the human touch back at the heart of fundraising**

**Grahame Darnell, Partner Consultant, Think Consulting Solutions**

'People give to people' goes the old adage. Yet recent times have seen evidence of some charities treating donors as a number on a database. Digital innovation may have made communication cheap and easy but some elements of human engagement were lost along the way. This presentation examines: why we need to bring back the human touch and how to do it with illustrative examples from across the sector.

**11:15 - 11:40 Why are charities looking to borrow and how can it help?**

**Seb Elsworth, Chief Executive, Access Foundation - Trading, enterprise and seeking investment**

Putting social investment in context: how are charities using loan and other sources of investment to grow and diversify their income?

- What is on offer and from whom?
- What do social investors want to see, and what questions should we be asking?
- What support is out there and what's my first step?

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### 11:40 – 12:05 How can you recognise tangible benefits from changes in finance technology?

**Nicky Wilkins, Head of Customer Engagement, bluQube**

Following on from last year's successful seminar on what's new in finance technology, the most frequently asked question was "How can my organisation ensure the benefits of change are realised?" Using live demonstrations Nicky Wilkins will walk you through how to measure whether changes have been effective and offer you a 'savings calculator' to help you set expectations before taking the plunge to change. As Head of Customer engagement at bluQube, Nicky and his team help customers to realise the potential of more than just their software. "The real wins come from changing the success of the organisation".

### 12:05 – 13:05 Lunch

### 13:05 – 13:30 Dual Stream

**Investment Stream: The three key risks facing a charity's investment portfolio: lack of diversification, inflation and costs**

**William Reid, Head of Charities, Quilter Cheviot**

Simplicity and transparency generally go hand in hand. However, the challenge as ever for most charities is how to achieve a real return (income and capital) within the appropriate risk budget. The current market dynamics highlight the importance of diversification, the impact of inflation and cost of investment management.

**Finance Stream: The pensions landscape for the charity sector**

**Gareth Hopkins, Director, GJH Pensions**

Gareth Hopkins covers the next steps for employers dealing with pensions re-enrolment, and the opportunities for improving engagement among the workforce. Also, the risks associated with taking on local authority contracts and how long-term pension risks can be managed.

### 13:30 – 13:55 Dual Stream

**Investment Stream: Active vs. Passive Investing: The great investment debate**

**James Pettit, Investment Director, Rathbones**

The great debate over the merits and shortcomings of active vs. passive investment management began many decades ago and still rages on today. James Pettit will cover the history of the debate, discuss the advantages and disadvantages of each approach, how your individual charity investment requirements are key to choosing the right strategy and why a hybrid approach may be the winning formula.

**Finance Stream: The journey from accounting data to business intelligence**

**James Vear, Business Development Manager, PS Financials**

Financial systems have evolved significantly over the past few years, no longer are they silos of flat accounting data, but are rich repositories of information that goes beyond just accounting which can be viewed in multiple dimensions by managers, stakeholders and trustees. In this session we will share with you a vision of how our innovative financial management software, is being used by charities and NGO's at the heart of their Business Intelligence strategy.

### 13:55 – 14:20 Dual Stream

**Investment Stream: Global investing and good governance**

**Julie Hutchison, Charity Specialist, Standard Life Wealth**

**Patrick Trueman, Head of Charities, Standard Life Wealth**

With the speed of change in world events, there's arguably never been a more important time to take a global view when it comes to how a charity's portfolio is invested. This session will look at two key themes; (1) why being global matters for a charity's investments, and (2) how this is linked to benefits for a charity in terms of governance.

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### **Finance Stream: Selling for good - charitable commerce online**

**Nick Aldridge, CEO, PayPal Giving Fund**

The continued growth of technology-enabled commerce brings new opportunities for charities to grow their fundraising and supporter base online, and new challenges for charities in forming partnerships with online businesses. This session explore some of these challenges and opportunities, and the approach taken by leading online businesses such as PayPal, eBay, and Humble Bundle to partner with charities in the UK.

### **14:20 – 14:45 Dual Stream**

#### **Investment Stream: Investing with impact - the new dimension for charity portfolios**

**Tom Rutherford, Head of UK Charities, Lombard Odier**

Greater social awareness is bringing greater demands of charity trustees to ensure their investments align to their mission. The distinct traditions of investment and grant-making are converging as investors seek positive outcomes through their investment portfolios, often around the issue of climate change. Big data in an information age provides both the tools for achieving this as well as weapons for public censor for failure. We look at the trends driving change both investor, and market, behaviour and ask if positive social factors can lead to better financial outcomes. Finally we will explore the social issues that will likely most concern investors next.

#### **Finance Stream: Reviewing the tax environment for charities**

**Richard Bray, Vice Chairman, Charity Tax Group**

Recent topical tax developments including Gift Aid changes, making tax digital, the Apprenticeship Levy and the VAT and other tax implications of Brexit.

### **14:45 – 15:10 – Coffee Break**

#### **15:10 – 15:35 Innovation and compliance – partners in fundraising leadership**

**Peter Hills-Jones, Director of Compliance, Institute of Fundraising**

Peter Hills-Jones, as Director of Compliance of the Institute of Fundraising, will reflect on the changes charities and agencies have made over the course of the last year. By responding to the developing regulatory and political environment, fundraisers have been at the forefront of developing existing channels such as face-to-face fundraising to ensure it has a sustainable future. In his presentation, Peter will take delegates through some of the practical changes charities have made to ensure they are being compliant and will show how this has not prevented innovation and new ideas being implemented.

#### **15:35 - 16:00 Civil society futures**

**Dr Dhananjayan Sriskandarajah, Secretary General and CEO, CIVICUS**

A national conversation is taking place on how English civil society can flourish in a fast changing world. Danny Sriskandarajah introduces this new independent inquiry, and invites everyone involved in civil society to make their voice heard.

### **16:00 - 16:05 Chair's Closing Remarks**

### **16:05 - Onward Networking Drinks Reception**