charitytimes

January 2018

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The medium is the message

About a decade ago, my Grandfather handed me the book Understanding Media by Marshall McLuhan, with post-it notes clinging to the first chapter: The medium is the message.

The chapter's title – a famous phrase coined by McLuhan in the 1960s – meant the platform we use to send a message can have a lot of influence over how the message is perceived by its audience.

McLuhan had this theory that when people want to tell a story, they often focus on the content to provide valuable information, but miss the opportunity to show people how they are adapting to change through the medium in which they tell it.

During my first couple of months here at *Charity Times*, this phrase has made a comeback. In an age where the likes of Facebook and Amazon are competing to be the new JustGiving (p.8) and street collectors are beginning to use contactless card machines (p.36), it has never been more important for you to promote your charity's message through the right medium.

Before I started this job, the general consensus among the press and the sector seemed to be that many charities have been feeling both restricted and silenced by rules contained within the Lobbying Act, aka Westminster's 'gagging order'. And the writers in this issue certainly won't tell you otherwise.

But in the couple of months I've been editing *Charity Times*, the people I have been lucky enough to meet (p.16) and the e-mails I have received tell an entirely different story. This sector doesn't feel silenced to me. From the letters you've sent to the government asking for change, to the data you've published on the inner workings of the sector; you've spoken out for the communities you serve.

Now it's time to take McLuhan's advice and look for new and exciting platforms to promote your message, so everybody else can hear you as loudly as I have. This issue's feature on social media (p.40) highlights just one of the ways you can be more vocal to a wider audience, while our fundraising agenda (p.36) looks at some of the innovative tools you can use to increase donations and showcase your confidence through savvy technology.

Of course there are plenty of challenges to overcome in the year ahead, but there are also some really exciting opportunities to embrace, too. I look forward to working with you all and can't wait to see what new mediums you're going to be using to tell your message.

Happy New Year,

Lauren Weymouth, Editor

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THE TOP CHARITY CEOS ON SOCIAL MEDIA ARE ANNOUNCED, with Matthew Hodson from NAM stealing the top spot. The results were announced at the Social CEO Awards on 17 November and the top 30 CEOs were selected from 101 nominations. Hodson is the executive director of NAM – a charity that provides information about HIV and aids. He won the overall award for the charity leader with the best social media presence.

REPORT WARNS TRUSTEES 'DO NOT REFLECT THE COMMUNITIES CHARITIES SERVE'. The Charity Commission published a major report into charity trusteeship, which has highlighted the need for charities to do more to promote diversity on their boards. The report, commissioned by the Office for Civil Society and the Charity Commission itself, and delivered by a consortium led by Cass Business School and the Cranfield Trust, found there is a severe lack of diversity on trustee boards, with the majority of trustees being white, older and above average income and education.

THE GOVERNMENT INTRODUCES A NEW STRATEGY FOR CHARITIES, which it claims will help to develop a better relationship between the civil sector and communities.
Minister for Civil Society Tracy Crouch said the strategy will provide an opportunity to explore ways to build new partnerships between public sector bodies and charities, to "mobilise resources and expertise" and find "new solutions" to the problems the charity sector faces.

COMMISSION OPENS INVESTIGATION INTO CHRISTIAN CHARITY. The charity, Into the Light Ministries, is being probed after third party raised concerns about its financial controls. Upon reviewing the charity's bank account records and other accounts previously filed, it found "significant concerns". Concerns were highlighted regarding the charity's accounts, potential conflicts of interest, non-primary purpose trading and public benefit, indicating a possible risk to charitable property.

GOVT TO COMMIT FURTHER £36M OF BANKING FINES OVER THE NEXT THREE YEARS to support charities, at the same time as the scheme comes to an end. In the Autumn Budget 2017 documents, the government said it will commit more Libor funding to support armed forces and emergency services charities as well as other related good causes.

THE SWITCH TO CONTACTLESS PAYMENTS IS COSTING CHARITIES, as cash donations significantly start to reduce, Consumer Intelligence has shown. A nationwide study found 37 per cent of people who regularly donate money to charity have cut back due to a lack of cash, donating an average of £14 less a year each. The research highlighted around 58 per cent of adults are using less cash than they used to a year ago.

"The report ... found there is a severe lack of diversity on trustee boards, with the majority of trustees being white, older and above average income and education."

SPORTS CHARITY STREET LEAGUE HAS CREATED THE 'FIRST EVER' ONLINE DASHBOARD in a bid to drive transparency in the charity sector. The dashboard will allow users to interact with real-time data about the young people the charity is supporting. Street League is a national charity, which provides a sport and employability programme for unemployed 16-24 year-olds. Last year, 80 per cent of the programme participants were from the top 40 per cent most deprived areas in the UK.

AMAZON IS INTRODUCING ITS AMAZONSMILE FUNCTION TO THE UK to channel charity donations from Amazon customers. When a customer shops via smile.amazon.co.uk, Amazon will donate 0.5 per cent of the purchase price to customers or the charities. The UK version is launching with 10 major UK charities, including Cancer Research UK, The British Red Cross, and the Royal British Legion, with enrolment opening to all UK charities registered with the Charity Commission next year.

UK CHARITIES BLAME TOUGHENED REGULATORY ENVIRONMENT FOR AN INCREASE IN CHARITY COSTS. According to Newton Investment Management's annual Charity Investment Survey, none of the charities surveyed said they felt the regulatory environment has become easier over the past few years. Over 60 per cent of charities said they felt the environment has become more challenging. Two thirds of people said the tougher environment has been to increase their charities' costs.

FACEBOOK LAUNCHES NEW PERSONAL FUNDRAISING TOOL. The tool allows users to personally fundraise for friends, family or causes they care about. The new tool, Personal Fundraisers, comes at the same time as Amazon has launched AmazonSmile in the UK – a function that channels charity donations from Amazon customers – highlighting the increasing competition among digital fundraising tools. Personal Fundraisers is available to everyone in the UK over 18 years of age for categories including education, medical, pet medical, crisis relief, personal emergency, funeral and loss, community and sports.

TRACEY CROUCH SAYS CHARITY LEADERS MUST TAKE TIME TO FORM PARTNERSHIPS. Charities can unlock more potential by finding ways of making partnerships across the sector more effective, Minister Tracey Crouch has said. In a blog written for Acevo's 30 things to think about, Crouch, the Minister for Sport and Civil Society, said charities must take the time to focus on planning for the future and looking for new partnerships and opportunities, rather than just on the day-to-day running of key services.

CITY BRIDGE TRUST GRANTS £2.8M TO LONDON CHARITIES TACKLING INEQUALITY. The City of London Corporation's charitable funder, City Bridge Trust, has awarded grants totalling over £2.8million to 18 charities tackling inequality and disadvantage across London in its latest round of funding. Included in the grants is £270,000 to the NSPCC towards supporting children and young people who have been, or are at risk of being, sexually exploited, as well as £98,400 to Stop the Traffik, a charity working to prevent modern slavery and human trafficking, towards a community project in West London.

LARGE NUMBER OF CHARITIES DON'T HAVE ETHICAL INVESTMENT POLICY, SURVEY REVEALS. Over a third of charities don't have ethical investment criteria in their investment policy, a survey by Brewin Dolphin has revealed. The survey, *Charity Investment: What Matters Most?*, found 34 per cent of charities don't have ethical investment policies, primarily because of the "tension" between their fiduciary duty to ensure they achieve the best possible returns, and ethical considerations.

COMMISSION HAS MADE 'SIGNIFICANT PROGRESS', BUT HAS MORE TO DO, SAYS NAO. The Charity Commission has "improved significantly" in recent years, but still has work to be done, the National Audit Office has said in its latest report. The NAO report on the progress made by the Charity Commission focussed on the progress that the Commission has made since the NAO's last report which was published in 2015. The report examined areas that could be improved and made suggestions for the Commission to consider next.

CFG LAUNCHES NEW STRATEGY TO IMPROVE FINANCIAL LEADERSHIP IN CHARITIES. Charity Finance Group has launched a new strategy, designed to provide more leadership skills to leaders such as CEOs, trustees and other senior managers. As part of its

annual report and accounts, CFG said the new strategy is designed to enable the body to become a 'go-to' for all charities on charity finance. The body's annual accounts showed its income has fallen by 7 per cent due to a one-off grant given to help support the small charities programme. Expenditure also rose by 9 per cent due to filling staff vacancies.

MANY CHARITIES NOT 'FIT FOR DIGITAL ERA', RESEARCH FINDS. Many charities are not "fit enough for the digital era" and need to embrace cloud technology to adapt to the future, new research has revealed. According to the Advanced Trends Report 2017, 65 per cent of charities use cloud-based technology, yet nearly one in four (26 per cent) do not have access to real-time data and 40 per cent do not have the right tools to do their job effectively. The software and services company said charities will be "held back" if they don't embrace the cloud at the heart of their operations and use it to run core functions such as donor interactions and financial management.

What did the Autumn Budget bring for charities?

CHARITIES WERE LEFT DISAPPOINTED, BUT THERE'S STILL HOPE

WRITTEN BY: LAUREN WEYMOUTH

Another year draws to a close and another two government budgets have passed by, failing to deliver the civil sector and its communities the airtime or attention they deserve.

The Autumn Budget, delivered in November by Chancellor Philip Hammond, left charities hugely disappointed. While the speech delivered positive news for the young and future generations, it left the civil sector largely untouched.

While no news is, in many cases, good news, it just wasn't enough for charities, who were left wondering whether the government's plan was just to avoid and ignore the existence of the civil sector entirely.

Charity Finance Group chief executive, Caron Bradshaw, noted there were a number of "disheartening" references to business and physical infrastructure, but not to charities.

The government's main focus this autumn was on housing. A welcome announcement to first-time buyers, Hammond pledged to build more homes to make "the dream of home ownership a reality for all generations", and additionally abolished stamp duty for first-time buyers for properties under £300,000.

"But [this focus] is backward looking, because our future prosperity comes from having strong communities, which charities help to create," Bradshaw added. "Bricks and mortar is fine, but real growth comes from sustainable communities where people want to live. We need to put our role at the centre of the economy and society in front of politicians, so that public investment benefits everyone."

Picture source: Shutterstock.com

" Our future prosperity comes from having strong communities. Bricks and mortar is fine, but real growth comes from sustainable communities."

YMCA Birmingham's CEO Alan Fraser also expressed his disappointment, claiming building 300,000 new homes every year "will not, of itself, solve the housing crisis".

"The government needs to make sure that these new homes are the right kind of homes and in the right places," he said.

However, it wasn't all bad news; Hammond addressed the issue of homelessness, pledging to invest £28 million in three 'housing first' pilots and a homelessness taskforce to eliminate homelessness by 2027.

"I want to say something about rough sleeping," the Chancellor said. "It is unacceptable that in 21st Century Britain, there are people sleeping on the streets. So, we'll invest £28 million in three new 'housing first' pilots in the West Midlands, Manchester and Liverpool and establish a homelessness taskforce as part of our commitment to halving rough sleeping by 2022 and eliminating it by 2027."

Although no further announcements were made in Hammond's speech, the Budget documents revealed the government plans to commit a further £38 million of banking fines over the next three years to support charities, which will draw the Libor funding scheme to a close.

Since the scheme was initially launched in 2012, a total of £773 million has been committed to charities and other good causes. Some of the charities to receive funding were Age UK, Poppyscotland, The Royal British Legion and British Nuclear Test Veterans Associations. ■

People on the move...

The latest appointments from around the charity sector

If you have any appointments to announce please contact lauren.weymouth@charitytimes.com

RUBY WAX

Comedian and campaigner Ruby Wax has been appointed as president of UK relationship support charity, **Relate**. Wax, who is also an author and long-time mental health campaigner, will take up the two-year role with immediate effect. Her appointment comes after 24 per cent of Relate's clients said mental health is an issue in their relationship.

NICHOLAS MONTAGU

Former Inland Revenue chair Nicholas Montagu is set to chair the **Charity Tax Commission**, established by the NCVO to help keep up with a wealth of changes to the sector. Montagu will lead a high-level team of commissioners, who will undertake a full review of the charity tax system and develop recommendations to government.

PETA FOXALL

Peta Foxall has been elected as the chair of **The Wildlife Trusts.** Currently chair of Devon Wildlife Trust, Foxall is a passionate conservationist and advocate for the role of nature in education and people's health and wellbeing. She brings extensive leadership experience in a wide range of sectors, including the NHS, higher education institutes and charities.

MADELEINE CASSIDY

Neonatal development charity, **The Brazelton Centre UK,** has appointed Madeleine Cassidy as its new chief executive officer of the Brazelton Centre UK. Cassidy took over leadership of the organisation in October 2017 and joined the charity from a lengthy career within both the charity sector and commercial organisations.

GEMMA JUMA

Gemma Juma has joined the **Jack Petchey Foundation** in the new role of operations director. Juma was previously the director of Link Age Southwark, a volunteering charity working to support older people to thrive in later life. She brings with her 20 years' experience in policy, delivery, leadership and grant-making roles in the voluntary sector across the world.

MATT LENT

National education charity **Future First** has appointed Matt Lent as its new CEO. He joins from UK Youth in January where he is currently director of partnerships and policy leading on cross-sector partnerships, income generation, impact measurement and national policy. He joins the charity with 25 years' experience in the voluntary sector.

DOMINIC JEREMY

The **Zoological Society of London** has appointed Dominic Jeremy as director general. Jeremy will be responsible for helping to achieve ZSL's goal of the global conservation of animals and their habitats. His role will include overseeing ZSL London Zoo and ZSL Whipsnade Zoo, as well as ZSL's Institute of Zoology and field programmes around the world.

TAMMY GREEN

Scotty's Little Soldiers has appointed Tammy Green as community fundraising manager. Green will be heavily focused on creating volunteer fundraising groups across the country, together with recruiting volunteers to help with a range of support roles within the charity. The charity is dedicated to supporting bereaved forces children.

PAUL VOLLER

Paul Voller has joined **VWV**'s charities team from Bircham Dyson Bell, where he has been a partner for the last 18 years. Voller has deep and longstanding experience of advising a wide range of charity and other not for profit clients, particularly in relation to corporate and commercial issues. He becomes the 15th member of the VWV charities team.

DONNA BULMER

Donna Bulmer has been appointed to the finance sub-committee for **Changing Lives**. Managing partner at Haines Watts, Bulmer has long-standing experience of the charity sector and will use her expertise to help Changing Lives with finance and governance matters, which will enable the charity to carry on its good work in the North East and across the UK.

LIZ BUTLER

The Sea Life Trust has appointed former Welsh Assembly accountant Liz Butler as its head of finance. Butler was previously head of finance for West Wales following the Welsh Assembly's inauguration and the subsequent devolution of Wales's NHS services. She previously worked for the Welsh government for five years, then a further 17 years in a consultancy.

Legislation

WHERE CHARITIES SHOW COURAGE, WE CAN HAVE SUCCESS

CARON BRADSHAW IS CHIEF EXECUTIVE OFFICER OF THE CHARITY FINANCE GROUP

Several years ago, CFG started to hear from members about the challenges they were facing in maintaining access to banking services. Concurrently there was significant media attention regarding the loss of banking services by Muslim charities. In response to these events we surveyed members to document the problems faced by charities, particularly those working overseas, in order to better understand the issues and take their concerns to policy makers.

You may be familiar with inflammatory headlines linking risk, finance and Muslim charities. However, the factors behind bank de-risking are not simply related to Muslim charities or only national, but rather are global and complex.

There have been unintended consequences from the arguably rational behaviour by banks, in response to the policies of governments to combat money laundering and terrorism.

Many charities work in dangerous environments, providing critical humanitarian, peacebuilding and reconstruction activities. The proximity to danger alongside a perception that charities were more amateur than their private sector counterparts, led to banks pulling out of their relationships with charities or placing them under more onerous due diligence requirements.

Being left without access to banking has obvious impact. Increasing the range of due diligence hoops charities have to jump through creates significant costs and raises concerns about the viability of organisations operating in fragile environments.

Not only did we have to convince regulators that there was a problem, we had to gather evidence and convince policy makers that this wasn't just charities trying to avoid their responsibilities. Success! Policy makers listened.

But so often, we would stop there as a sector. We've been heard by government; job done. But in assessing the problem, it was clear we would need to push for reform at an international level across a range of areas. Some of these, such as counter-terrorism regulation and sanctions, are almost taboo. Would we open the sector up to charges that we are sympathising with terrorists if we pushed for change? And as charities are small fry in the bigger picture should we not accept that we were not going to be a priority?

Fortunately, CFG and partners refused to put this in the "too difficult to solve" box. Starting at a global level, we joined an international coalition of NGOs to reform money laundering and terrorist financing rules issued by the Financial Action Task Force. The work of UK NGOs and the Charity Commission was decisive in getting this global body to drop its reference to charities as "particularly vulnerable" of criminal abuse. This opened the door for change in the UK.

At a national level, we have pushed for change with Ministers, Parliamentary Select Committees and with organisations such as the British Bankers Association. Engagement with the then reviewer of counter-terrorism legislation, David Anderson QC, led to a recommendation that an ongoing formal dialogue should be created between government and NGOs on the unintended consequences of counter-terrorism legislation. This is now starting.

We have changed the way that the government has reviewed risk in the sector. Thanks to significant engagement with HM Treasury, the government has now reduced the risk rating of the sector to "low". This will help give the banks greater confidence in dealing with the sector.

Finally, we are pushing for changes to sanctions rules, which concern both charities and banks. A Sanctions Bill is going through parliament, which could allow the creation of general licences for humanitarian activities, such as exist in the US, which would give greater clarity. We have achieved a lot. We've proven our sector's significance in a complex area. We must continue to show courage to achieve policy change. ■

Fundraising

LET'S SPEAK UP FOR THE SECTOR WE SERVE

Like many of you, I'm sure, I've been looking ahead to next year and thinking a lot about our sector; worried about where we are at, how bruised we are all feeling, how we are being presented and how we are representing ourselves.

It is not about individual causes or charities, which are still out there doing fantastic things, day in, day out, but it is about how we as charities as a whole represent themselves or are represented.

In recent weeks this has again been brought to a head in the way some media articles talk about the charity sector. Firstly the Telegraph's misleading and disingenuous front page article on charity fundraising, sparked by an interview with Lord Grade, and secondly the Daily Mail's latest 'investigation' into university fundraising research.

By the time this article goes to print, we may have seen even more such headlines. It is really frustrating for me, my team at IoF and I'm sure the whole fundraising community that after so much effort to review and improve practices, parts of the media still feel it is open season to run attention grabbing headlines with little or no substance behind them.

But these recent weeks have also shown us examples of how best to respond as charity leaders. I was especially impressed by Mark Goldring, CEO of Oxfam, on the Today programme in mid-November speaking powerfully about the success of their charity shops (including a 22% growth online). It was all thanks to the generosity of the British public and the refocus of Oxfam's programmes on areas of greatest need, driven by conflicts around the world.

Pressed on the 'difficult' questions about spending on overheads, he was open and transparent about the need to spend on management costs and fundraising. Asked about fundraising practices, he fluently spoke about how the whole sector had embraced change over the last two years.

Mark made me proud to work in the same sector as him. He made it absolutely clear that it is only thanks to the generosity of the British public that Oxfam can deliver its work responding to disasters and enabling people to live better lives. Crucially, he spoke with authority not only for his charity, but also for the sector as a whole in a way that not enough leaders have done.

Many charity leaders speak powerfully about the impact of their individual organisation's work, whether it is fighting homelessness or research into devastating diseases; providing mental health support or reducing the impacts of climate change. But too few then go on to successfully thank the British people for their generosity, are open about how modern charities work, or build the links from their specific cause to the sector more generally.

And this is the vital dialogue that is missing for me about our sector as a whole – talking powerfully about our collective causes. Our end causes are fundamental to people understanding our role and our impact across society. No matter how passionately people talk about things that are generic to the sector – volunteering, commissioning, governance or fundraising – they just don't connect. Politicians, the media and the general public have a fundamentally emotional response to individual charities, but the generic just doesn't cut the mustard.

We need more charity leader advocates who can elegantly and eloquently explain our collective charitable objectives; based on making the world less unequal, supporting people to move out of poverty, giving people a better education, researching the cures for disease or supporting people with health problems.

We must do more to collectively engage the government, challenge negative media stories and inspire the public. As we look to the coming year I would urge all charity leaders to accept this challenge and step forward to speak not just for your individual organisation, but for the entire sector we all serve. ■

PETER LEWIS IS CHIEF EXECUTIVE OF THE INSTITUTE OF FUNDRAISING

Regulation

IS IT TIME FOR A CHANGE OF APPROACH?

GILLIAN MCKAY IS THE HEAD OF CHARITIES AND VOLUNTARY SECTOR AT THE ICAEW

The Charity Commission consultation regarding the proposed changes to the 2018 charities Annual return has now closed. The proposed changes are quite significant and the Commission considers this review is the most thorough since 2013.

It is hoped that the new return will minimise the amount of information small charities need to send each year, targeting additional questions at larger or more complex charities. The Commission believes this will reflect their risk priorities, tackle new regulatory risks as they emerge and strengthen the sector.

The return will now contain an Update Charity Details (UCD) section, along with a section A,B and C. The UCD will require information about the charity's governance, activities and policies. This information can be updated throughout the year as and when the charity's details change. Part C of the annual return will require charities to confirm that the information in the UCD is correct, so providing it is and the charity is relatively small and straightforward then no further work would be required

The UCD will also contain a series of new "trigger" questions, which will determine which, if any, of a series of new questions will be asked in section A of the return. This therefore is intended to identify larger or more complex charities and of more interest to the Commission's regulatory risk priorities. Section B will ask specific questions about the financial details of all charities with income over £500,000.

The consultation has focused on the new questions to ask of the sector, whether collecting the information required in these questions would place an additional burden on charities.

It seems rather obvious that the requirement to answer any new questions will inevitably add to the burden on charities. Some of the questions require quite a lot of detail and it is hard not to notice that the new questions relate to recent issues that have arisen in the charity sector or have arisen through the Commission's investigation and compliance work. It is perhaps questionable whether the annual return is the best vehicle for the Commission to tackle regulatory risks.

But we also need to be mindful that the Commission is the charity regulator in England and Wales and as such it is charged with the task of addressing matters that come through its compliance work. It has come under criticism in the past for apparent failings in its regulation of the sector and it is therefore unsurprising that it is looking to introduce additional questions in an attempt to scale the extent to which charities are exposed to regulatory risks.

What is unfortunate is that a lot of the information to the new questions is already held elsewhere. For example, the amount of gift aid claimed is held by HMRC, another government department. It feels a missed opportunity not to use information that is already collected in one part of government by another.

The charity sector is one that can least afford to waste resources in providing the same or similar information to different government departments or agencies. While the Commission acknowledges the need to establish a balance between collecting the information it requires and the additional burden on charities, it may be worth considering root and branch reviews into how charity information is collected.

For example, the charity regulator in Australia, the Australian Charities and Not-for-profits Commission (ACNC), has developed the concept of a "charity passport" as a red tape reduction initiative that adopts a "report once, use often" approach. This enables Australian charities to fulfil most if not all of their information compliance requirements by providing a single return to the ACNC which other government agencies can access directly from the ACNC.

A similar approach in the UK would be of great benefit, not only to the charity sector but also to government agencies. Perhaps, with increased digitalisation, the time is right to consider such an approach. ■

Property

PROPERTY EDUCATION SAVES THOUSANDS OF POUNDS

What do Bristol, Newcastle, Islington, Stockton, Norwich, Durham, Birmingham, Caerphilly and Southwark have in common?

Answer: a vibrant voluntary sector where staff, trustees and volunteers in the last 12 months, have taken part in the National Property Education Programme.

This workshop series was set up by the Ethical Property Foundation to address an urgent and growing need for property education. I mooted it in this column last year and received so much feedback, it was clear that a 'fishing rod not a fish' approach was vital for a sector that often knows so little about property.

Recent research by the Charity Commission showed 43 per cent of voluntary organisations have suffered unforeseen property costs, while 45 per cent see property as the biggest threat to sustainability. This is why our goal was to get out of the office, sniff the air and support local people in their local communities.

In partnership with CVS and community foundations in 2017, we supported 154 organisations, all of which are responsible for a vast range of property assets. Besides every sort of office premises, we found ourselves advising on oast houses, church buildings, former schools, barns, streets of terraced houses, fields, portacabins, libraries, old theatres and former mills. All of these were held by small organisations with no property staff – or, in some cases, no staff at all.

We encountered a huge diversity of experience, yet in every workshop what was shared was the stress and fear around making property decisions.

Overall, we estimated that one in three participants own property and land, but did not understand how they could make best use of these assets. Startlingly, several did not even know what their ownership status was: records having been lost, with ownership assumed over time. It's a total minefield.

We also saw clearly the learning gap, which will drive forward future online support and our 2018 workshops. Around 80 per cent of the workshop participants did not understand the importance of monitoring building performance, utilisation and charges. Thousands of pounds were being wasted, taking precious resources from front line services. This is all because people did not know the property basics.

This is exactly why our mission was to equip all 154 organisations with knowledge and confidence. And we want every UK charity to understand that with a bit of knowledge and confidence, everything is negotiable with landlords. Yes, you can challenge the 'take it or leave it' landlord attitude, indeed you have a duty to do so, for your cause as well as your staff and volunteers' well-being.

Many good landlords support the sector, but the truth is that considerable numbers have always taken voluntary organisations for do-gooding, know-nothing mugs. Our mission is to help the sector wise up and push back. With a bit of property know-how and support, a whole world of opportunity opens up.

Yes, our UK voluntary sector has its challenges, but it is also a lean, innovative sector with huge reserves of energy, local knowledge and social capital. In a post-Grenfell, post-Brexit business environment, however small our turnover, we really don't need to take any nonsense.

So, what's new for the Ethical Property Foundation in 2018? A brand new national programme series offering new places and repeat visits; practical interactive workshops on negotiating leases; managing asset transfers; saving money on premises costs and how to acquire property with success. Plus, the old favourite property management for non-property managers – for all those who are passionate about their social mission but find it hard to care about the state of the roof.

And we're coming to a town near you: Manchester, Newcastle, Plymouth, Grimsby, Bedford, Shrewsbury, Durham plus six workshops across Greater London from Barking to Mitcham. See you there! ■

ANTONIA SWINSON IS CHIEF EXECUTIVE OF THE ETHICAL PROPERTY FOUNDATION

Profile: Simon Gillespie

Expanding a cause close to the heart

BRITISH HEART FOUNDATION CHIEF EXECUTIVE SIMON GILLESPIE TELLS LAUREN WEYMOUTH HOW THE CHARITY PLANS TO EXPAND OVER THE COMING YEARS AND WHY IT'S ALWAYS IMPORTANT TO PUT THE CAUSE BEFORE THE ORGANISATION.

Sat in Simon Gillespie's Camden office, we joke about the common mistake made between the British Heart Foundation (BHF) and former-retailer British Home Stores (BHS). "I've had a number of people e-mailing me, complaining about BHS," he says. "I really don't think they even realise they're e-mailing the wrong CEO."

But the irony behind the mistake is that the British Heart Foundation isn't so dissimilar after all. "It's funny really, because we are always looking to hop onto new opportunities," he says. "When BHS closed down, it provided us with new opportunities to grow. In fact, when any retailer closes down, it provides us with a new opportunity. We have just recently opened a large BHF home shop in one of the old BHS spaces."

As Gillespie jokes about the irony of it all, I think back to my wait in the BHF reception – located in the former Carreras Cigarette Factory in Camden, London – and how I'm surrounded by 'stop smoking' flyers. It's at that point I realise this organisation isn't afraid to make a point, and that's exactly why it is bigger than ever.

The charity was founded in 1961 by a group of medical professionals who wanted to be able to fund extra research into the causes, diagnosis, treatment and prevention of heart disease. Over half a century later, the organisation is now the singular biggest funder of cardiovascular research in the UK.

Family connections

Gillespie joined the BHF in 2013, after falling into the charity sector "almost by accident". After being in the Navy for 23 years, he left at the age of 40 and became the director of operations for the Charity Commission. Having known nothing about healthcare, Gillespie's only experience was personal. From regulating the charity sector at the Commission, Gillespie moved across to the Multiple Sclerosis Society as chief executive.

"I had a family connection to MS. My Aunt suffered from MS and I saw the impact it had on her and her two children – both of them had to look after their mother, it was incredibly hard. So, I was lucky enough to get a job there (Multiple Sclerosis Society)."

Gillespie worked at the charity for seven years, before moving across to the BHF as chief executive. It was once again, a family connection that led him to the organisation after he lost his Father to a sudden heart attack, just before his Father's 58th Birthday.

"He had a heart attack and didn't survive it – you just don't expect somebody to drop dead like that," Simon says. "There aren't that many medical conditions, where you can leave home in the morning and never come home."

But taking on the role of chief executive of one of the biggest organisations in the UK hasn't always been easy. "If anyone says it will be easy, they're lying to you" he says. "I moved here just over four years ago – straight in as chief executive, which was hugely complex. But this role allows me to do some truly amazing things."

Upon starting his role, his ambitions for the organisation were clear: to formulate a strategy. "Previously, the BHF hadn't been clear about what it was trying to achieve," he says. I think that was borne out by the various survey work we do about how the public view the BHF."

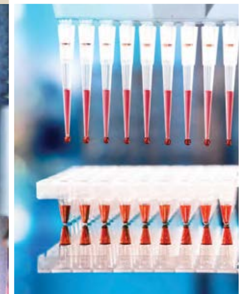
"People just weren't really clear about who we were and what we did. They knew we ran shops, but to be known purely as the organisation that runs charity shops doesn't strike what we're trying to achieve. We also have a track record of running life-saving research. But the pubic just weren't picking that up."

Research

Research forms a huge part of the BHF's existing strategy. Gillespie allocated £100 million into research every year when he started, and capped other areas at £30 million. "Very early on, we made a commitment to fund at least half a billion pounds into medical research over the five years of the strategy, which was an increase of about 30 per cent of our annual investment into research at that point," he explains.

"That was quite a change. It's gone well but it's about 3 years old now, so now we're looking ahead." The organisation sets strategies with a five to 10 year timeframe, meaning it generally only makes investments in BHF professors and other contributors to the charity for a five year period, with the possibility of renewing it for a further five to 10 years.

Gillespie says the charity is now in the



process of setting a new strategy, one with global success at its core. "We've built up a huge research base here in the UK, but we've also been working at a global level for a long time now."

The BHF currently pulls in researchers from all over the world, with a vast range of experience. Gillespie draws reference to the way in which operating research on an international level can allow things to change overnight.

"We know we have a global reputation. But there are certain circumstances where we can't do the work we do without being international. For example, trials on rarer conditions – congenital heart conditions, for example – need to be done on a multi-site basis in order to properly assess how to deal better with kids with those conditions."

A digital approach

It's not only research that's been on the BHF agenda, either. Gillespie jokes about my phrasing of a 'digital strategy': "In a couple of years, if anyone asks you how your digital strategy is changing, they'll laugh because it just won't be a thing. They'll raise an eyebrow and said "digital strategy? That's just how we do business". And that's exactly what we're aiming for," he says.

would be a brave call to wipe cash completely. It's still really important to be offering a range of opportunities for people. But there is a really strong ethos for supporting good causes, and we need to make sure as a sector, we're keeping pace of the mechanisms of that good will."

Challenges

Over the coming years, there are a number of challenges facing the organisation. Gillespie notes that while the BHF has come a long way, "history tells us there's still so much more to do".

"Heart disease is killing too many people. It's costing the NHS far too much and we have to tackle both human misery and the costs of it at the same time." While challenges lie in both fundraising and data regulation over the coming years, Gillespie is also confident about some of the positive opportunities ahead too.

But it's vital not to become too consumed in the organisation, he adds. "The broader economy presents a bit of a challenge for the future, and as a result, charities will come under pressure. We've seen how commissioners have been squeezing every drop out of contracts in the past, and I expect there will be a lot more mergers and collapses in the future."

Faced with challenges like this, Gillespie shares his ethos that during any difficult time, it's important for charities to make sure they always hold onto the cause they're supporting, not the organisation. "We always need to step back and make sure we're focusing on the cause and on the people outside of the organisation," he says.

"I know it's incredibly difficult when under pressure, but sometimes you just need to be really focussed on what you're actually here for. It's not to sustain the organisation; it's delivering the public benefit to that section of the public." ■

Two or three years ago, much like the entire charity sector, the BHF largely consisted of digitalised versions of analogue processes, but now the organisation has been busy examining ways in which they can put customers first.

"You have to put yourself outside of the organisation and into the position of the person who wants something from you, needs something from you and wants to give you something. Then, you look back into the organisation and see how those processes work," he explains. "When you do that, you really begin to see a transformation in the way you do business."

Some of the major digital changes have also taken place internally too – changes that have stemmed from looking out of the company for new solutions. Recently, the BHF launched a new finance system and in 2018, it will start to implement a new HR system, whereby every member of staff will have the ability to amend their records, look at training opportunities and everything on their smart phone.

"That will be a major step forward for us. It has been used elsewhere, but it's important for us to move ahead," he says. "Our staff and volunteers are increasingly looking to be able to interact with the organisation in different ways."

The organisation will also be looking to move towards cashless donations, but only when the market takes it in that direction. "In this case, the market is the people who give us money. It

REVIEW

Politics dominated the headlines this year, but charities spoke out

WRITTEN BY

LAUREN WEYMOUTH,

2017 in the news

At the beginning of the 2017, former Prime Minister David Cameron was appointed the new president of Alzheimer's Research UK. It was a somewhat misleading start to the year to assume politics and charity could work hand in hand.

As my predecessor noted this time last year, 2016 wasn't easy. In fact, it would have been kind to mark it down as a bit of a nightmare. It was, after all, the year that bruised business and charities alike with the dual shocks of Brexit and the rise of president-elect Donald Trump.

So naturally, in 2017, the sector was hoping for some change. Was Cameron's move to Alzheimer's a sign of good things to come? Unfortunately not. This year was still very much tainted by the political landscape and the charity sector was burdened by uncertainty.

Brexit

In the first full year since the EU Referendum, it doesn't come as a surprise that 2017 was totally dominated by Brexit. Ifs and buts played on charities minds as they prepared for the best and worst case scenarios. Of course the government didn't provide much ease, as rumours were rife of another referendum, before Theresa May finally triggered the two year process in March.

Unfortunately for charities, the process is likely to have some less than positive effects on finances. According to research from the Directory of Social Change, charities are at risk of losing over £250 million through Brexit, although the full amount could be "far higher" due to the way many funds are distributed by intermediary agencies

Photo credit: / Shutterstock.com

IN THE FIRST FULL YEAR SINCE THE EU REFERENDUM, IT DOESN'T COME AS A SURPRISE THAT 2017 WAS TOTALLY DOMINATED BY BREXIT.

in the UK, making comprehensive data difficult to obtain and analyse.

The research revealed the beneficiaries of "hundreds of charities" working in particular sub-sectors like overseas aid, research and conservation will likely be hardest hit, "unless the UK government acts swiftly to replace these funds".

It also found "strong disparities" in the distribution of funds across the UK home nations means the impact will also vary significantly across regions. So it's safe to say, charities have been worried.

Legislation

Meanwhile, the government hasn't provided much reassurance for charities. Both the Spring and Autumn Budget's revealed little in the way of favours for charities, despite numerous concerns raised by the sector.

Furthermore, the Lobbying Act has been playing on minds, with many charity leaders claiming to feel suffocated by what has been dubbed a "gagging order". The Lobbying Act dictates what charities are allowed to do publicly during the year running up to elections, in order to make sure people or organisations don't have an influence over the vote.

But refusing to feel in any way 'gagged', charities spoke out. This year, over 100 charities and some of the biggest organisations in the country such as Greenpeace and Save the Children, raised their voices.

In an open letter, the charities claimed campaigning was being lost from public debate due to what they said were "draconian" requirements of the Lobbying Act.

The Act was initially intended to tackle corporate lobbying and to stop pressure groups from influencing election results. But instead, it has heavily stifled campaigning and muted many voices.

In 2016, Lord Hodgson's report into reform of the Act proposed ammendments such as a reduction in the regulated campaign period to four months before an election, changes to the rules on joint campaigning and a reduction in the scope of the Act to include only activity intended to influence how members of the public vote.

The government was initially considering the Hodgson recommendations, but in the lead-up to the General Election in June, many charities complained that a lack of clarity about the rules on campaigning meant they felt unable to raise issues.

Despite an increasing amount of calls to implement the Hodgson recommendations, the government announced in September it would not be implementing them. At the time, it cited a lack of space in the legislative programme to pass the necessary law and that the Electoral Commission was not content with some technical aspects to the proposed changes.

But refusing to take no for an answer, charities spoke out again. In October, three major bodies representing thousands of charities wrote to the Electoral Commission, calling for a debate over the reform.

NCVO, ACEVO and Bond, which collectively represent a huge proportion of UK charities, asked the Electoral Commission to explain which proposed changes it opposes to and on what grounds.

In a letter sent to Claire Bassett, chief executive of the Commission, the three organisations requested a detailed explanation of why the Commission opposed making such changes to the Act.

"What's needed is an open conversation about how the rules on non-party campaigning can be changed so they meet their objective of ensuring fair electionsm," NCVO chief executive Sir Stuart Etherington said.

"There is consistent evidence that the law has a detrimental impact on the ability and willingness of the voluntary sector to speak out. We need prompt answers from the Electoral Commission so we can get that discussion underway."

Governance

But the charity sector hasn't been entirely dominated by political issues this year. Successful governance has also been a hot topic. Ever-keen to ensure charities are run to the best of their abilities, regulators have pushed for a greater focus on good governance.

In July, the new Charity Governance Code was released, outlining the standards that all charities in England and Wales should aspire to.

The Code contained three major recommendations: reviews for larger charities every three years; greater openness; and limits on how long trustees may serve.

Commenting on the Code, Etherington said there is a "clear consensus" within the sector that there needs to be a greater focus on governance. "With this in mind, I envisage that we will soon see a commitment to following the Charity Governance Code become a requirement from many funders. Taking action now is a way of getting ahead of the game," he said.

But there is one question still unanswered: what exactly is good governance? New Philanthropy Capital head of policy and external affairs, Patrick Murray said the debate around governance has previously focused on preventing "catastrophic collapses" such as Kids Company, whereas "coasting boards" can also be a real problem in holding the sector back from having a greater impact.

Grant Thornton chief not-for-profit operating office, Jenny Brown added that to "really achieve" the quality and excellence charities should be striving for, they "should continuously consider how to instil and deliver good governance into their organisation's culture and not view it as a separate compliance exercise".

Technology

Unlike other years, there was an overhelming focus on improving technology in 2017. While the inclusion of digital technology in

charity strategies is increasingly becoming the norm, charities are still being urged to look for new ways of adapting to a digital world.

According to the Advanced Trends Report 2017, many charities are still not even "fit enough for the digital era" and need to embrace cloud technology to adapt to the future.

The report revealed 65 per cent of charities use cloud-based technology, yet nearly one in four (26 per cent) do not have access to real-time data and 40 per cent do not have the right tools to do their job effectively at all.

The software and services company said charities will be "held back" if they don't embrace the cloud at the heart of their operations and use it to run core functions such as donor interactions and financial management.

But it's not all doom and gloom, technology has also had a huge impact on UK charities this year. Social media has increasingly become a successful platform for fundraising and the methods of donating have soared.

Trusteeship

The only thing preventing charities from fully embracing technology is a lack of skills among trustee boards.

A major report published by the Charity Commission towards the end of the year highlighted the need for charities to do more to promote diversity on their boards.

The report, commissioned by the Office for Civil Society and the Charity Commission, and delivered by a consortium led by Cass Business School and the Cranfield Trust, found there is a severe lack of diversity on boards, with the majority of trustees deriving from similar backgrounds and skillsets.

Charity Commission chief executive Helen Stephenson warned the research shows trustees "do not reflect the communities charities serve".

"Charities are therefore at risk of missing out on the widest range of skills, experience and perspective at board level," Stephenson said.

The findings revealed trustees lack relevant digital, fundraising, marketing and campaigning skills at board level. It also highlighted concerns about their skills in dealing with fraud and external cyber-attacks.

"Uniformity at board level also puts charities at risk of adverse group dynamics, including dominance by individuals or complacency of vision. Our casework bears out that problems in charities often have their root in a culture at board level which allows inappropriate behaviours and poor decision making to go unchallenged," Stephenson added.

"Diversity of experience, approach and personality helps guard against such problems and enables any organisation to foster a culture that is conducive to good governance."

Another year has passed us, and sadly, challenges facing the sector haven't got a lot easier. Did Cameron's appointment showcase the beginnings of a blossoming relationship between the charity sector and the government? Absolutely not. Has the burden from Brexit disappeared? Not a chance.

But amid it all, what we have learned from the news in 2017, is that the charity sector has come together to speak out, to take on new challenges, to embrace change and to thrive under difficult circumstances.

Read on as we take experts' views on the key items on charity leaders' agenda for 2018. ■

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OUTLOOK

Outlook 2018: Charity leaders' agenda

A year ago, charity leaders felt like their voices had been 'muted' – has anything changed?

WRITTEN BY DAVID ADAMS

Predictions for 2018 are even more difficult to make than usual, with the UK's torturous progress towards Brexit creating so much uncertainty. Some subjects are always on the agenda for charity chief executives, directors and trustees, such as fundraising and investment, but what other issues will be at the forefront of charity leaders' minds during the year ahead?

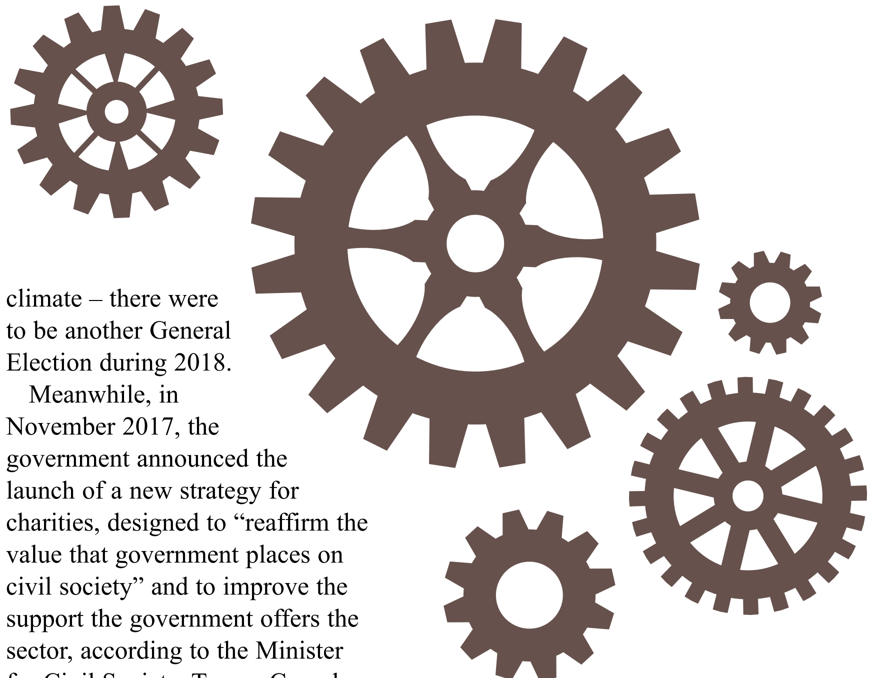
Speaking to power

When *Charity Times* asked the same question at the end of 2016, Charity Futures project director Sir Stephen Bubb expressed a hope that 2017 would see more charity leaders speaking out forcefully on behalf of their beneficiaries, many of whom were disproportionately affected by the consequences of public sector spending cuts. He was concerned that the third sector's voice had been "muted", by attacks on the sector in the press following high-profile fundraising and governance scandals, the effects of the controversial Lobbying Act and gagging clauses in public service contracts. He felt hopeful that 2017 would see charities and other voluntary sector organisations "recover our voice".

"Unfortunately, nothing has changed," he says now. "I think my optimism was misplaced. It's sad, but I think the whole business around Brexit has just compounded the problem. You've got government and political parties that are, in general, mesmerised by Brexit; and leaders within the sector who feel cowed by problems related to fundraising. I've never known a time when the charity voice has been both so quiet and so ignored."

The sector's grievances in relation to the Lobbying Act were acknowledged in part by recommendations for reform of the Act, proposed in Lord Hodgson's review of the legislation. They included reducing the regulated campaign period to four months before elections, changes to the rules for joint campaigning and a reduction in the scope of the Act so it only covered activity intended to influence voting behaviour directly.

But in September 2017, the government announced it



THE HODGSON RECOMMENDATIONS IS LIKELY TO REMAIN A FOCUS FOR DISCONTENT WITHIN THE SECTOR

would not be implementing the recommendations, citing a lack of time to pass the necessary legislation, and some objections raised by the Electoral Commission.

In October, the chief executives of NCVO, ACEVO and Bond wrote to the Electoral Commission requesting details of these objections. Electoral Commission chief executive Claire Bassett responded by stressing that it was the government's decision whether or not to implement the Hodgson recommendations; and pledging that the Commission would make itself available to offer charities advice and guidance about the current rules.

"We were disappointed by the government's reaction [to the Hodgson recommendations]," says NCVO external relations manager, Aidan Warner. "They were a sensible package of suggestions. But we have seen the Electoral Commission make clear that they understand charities' frustrations and are happy to help if charities have any questions. It's very important that charities don't feel silenced by the Lobbying Act. It shouldn't be a barrier to campaigning."

Nonetheless, the fact there are still no plans to implement the Hodgson recommendations is likely to remain a focus for discontent within the sector. The rules for campaigning will certainly return to the top of the agenda within campaigning charities if – as seems perfectly possible in the current climate – there were to be another General Election during 2018.

Meanwhile, in November 2017, the government announced the launch of a new strategy for charities, designed to "reaffirm the value that government places on civil society" and to improve the support the government offers the sector, according to the Minister for Civil Society, Tracey Crouch, speaking at the launch of the strategy. A consultation will be launched in 2018 to begin the process.

Small Charities Coalition chief executive, Mandy Johnson says she hopes this will offer an opportunity for smaller charities in particular to help shape the future of these relationships within and beyond the broader civil society sector. "We need to make sure that the conversation is with the whole of the sector and not just the big charities," she says.

Brexit

Organisations of all types and sizes across the sector will be affected by the consequences of Brexit – the deadline for which is now only just over a year away. The economic and financial instability caused by the result of the 2016 EU Referendum continues to have a direct effect on many organisations. All organisations operating across borders and/or purchasing goods and services abroad are adversely affected by the weakened pound. Many will also be affected by future changes to the immigration status of some beneficiaries and/or staff – or by the perception that Brexit could affect their status. Some organisations will also lose current sources of funding after Brexit, so will need to be developing a strategy to plug any shortfall.

Charities and other affected organisations should be considering very carefully how these issues might affect them during 2018, says Warner. "They need to be thinking about what actions need to be taken now, and what campaigning they may need to undertake," he says. "All organisations ought to be considering an audit of all areas of their work in relation to Brexit."

National Association for Voluntary and Community Action (NAVCA) chief executive, Jane Ide, believes Brexit will also have significant indirect consequences. "It's already having more of an impact than people realise, but it's a sort of

Leadership

negative impact: it's the things that are not changing when they need to be changed, the things that could be done that aren't being done," she says. "It is completely absorbing government time and energy – there is no chance of any legislative time being given to anything that isn't Brexit."

Regulation

Brexit may eventually lead to regulatory changes affecting the sector, but there will be other regulatory issues charities need to consider in the meantime, such as the proposal for the Charity Commission to be funded through a levy on charities. At the time of writing, the Commission is preparing to open a consultation on this question. It is clear there will be substantial opposition to the idea.

"There's a really important conversation we're looking forward to having with the Charity Commission about its funding and the impact that imposing charges would have on the organisations in our part of the sector," says NAVCA's Jane Ide. "I'm very concerned about the impact it would have on smaller charities, including our members. I think there's also a fundamental question about whether or not it would be helpful to the sector if donors knew that some of their donation would be going to the Charity Commission."

The other regulatory issue that should be on every charity's agenda is the EU's General Data Protection Regulation (GDPR), which comes into force in May 2018 and will affect any organisation holding data relating to named individuals resident in the EU. Its stipulations are certain to continue to apply in the UK in the longer term, regardless of Brexit.

"Anyone who hasn't started GDPR preparations should be doing so shortly," says Warner. "People's expectations about how their data is collected and used have changed, and it's very important for the sector's reputation that we meet those expectations. "It's just a matter of time before we see a serious and high-profile data breach in the sector due to a cyber attack, with the personal data of supporters or beneficiaries leaked.

"Chief executives should be thinking about how they're reinforcing their systems and teaching their staff about data security so it's not their organisation in the spotlight. It will be a reputational problem, as well as a regulatory problem: you'll be letting down people who trusted you with their data."

But he also suggests organisations should try to avoid being overwhelmed by "misinformation and scare stories" related to cyber security and instead to find a trustworthy source of advice. The Small Charities Coalition's Mandy Johnson agrees. "Everyone needs to be thinking about GDPR – but not to buy into the fear surrounding it, but to turn to organisations like us that are trying to make it easier," she says.

Leadership standards

The collapse of Kids Company continues to cast a long shadow over the sector – but also seems to have had one positive effect: encouraging many more organisations within the sector to review and seek to improve governance within their organisations.

"I think the Kids Company case had a galvanising effect," says Sir Stephen Bubb. "There has been quite a remarkable growth in interest in governance and leadership systems."

"Governance is going to be firmly on the agenda in 2018 – the level of attention on organisations'

THERE IS NO CHANCE OF ANY LEGISLATIVE TIME BEING GIVEN TO ANYTHING THAT ISN'T BREXIT

governance has been ratcheting up, and rightly so," agrees Warner. "If there are organisations that haven't taken a serious look at the governance culture within their organisations, I think that should be a priority for 2018. Are trustees getting the right information and having the right discussions? Are they holding the executive to account, but also being supportive of the executive?"

Warner suggests that the new Charity Governance Code, launched in July 2017, to which a range of organisations including NCVO, ACEVO and the Small Charities Coalition contributed, should help organisations seeking to improve governance practices and processes.

There is also ever more momentum gathering behind the drive to improve diversity within the governance bodies in charities of all types and sizes. This subject was an area of focus within the Charity Commission's report on trusteeship, published in November 2017, within which the Commission's chief executive Helen Stephenson stated bluntly that at present many boards of trustees "do not reflect the communities charities serve" and that further work was required to ensure charities had access to "the widest range of skills, experience and perspective at board level".

Ide stresses the value of diversity as a means of improving the decisions charities take. "The more diverse your organisation is, the better your decision-making is going to be," she says. "Organisations in the sector may lack money, but what we do all have as a resource is our people and our time. So we have a responsibility to have the best possible people in our organisations and I don't think we're doing that at the moment.

THE COLLAPSE OF KIDS COMPANY CONTINUES TO CAST A LONG SHADOW OVER THE SECTOR

"It is a challenge for many charities," she admits, "especially for organisations that want to draw their trustee boards from their members. But I would love to be in a position, in four or five years' time, to be able to say, "We have really driven forward on diversity". It would just make the sector better."

Using digital to improve efficiency – and taking a pause for thought:

"One of the things we're encouraging people to think about is how can you be more effective through using digital?" says Ide. She says NAVCA itself has made significant improvements in productivity by using digital tools. "We're quite a small organisation – there are only six of us – so we don't have time to waste on processes that are not slick, effective and productive," she explains. "Using digital tools, enabling ourselves to be more mobile, is making it much easier to use our resources for the benefit of our members.

"This is not that complicated: it's about grasping the opportunities that digital offers to do things differently, and so to put yourself into a good place to deal with whatever happens over the next few years."

But perhaps above all, Ide suggests, in 2018 charity leaders need to remember to do what anyone running any organisation ought to do as often as possible: to take a moment away from day to day operations to consider the bigger picture.

"The most important thing you can do for your own effectiveness is to make sure you take time to step back and think," she says. "A good trustees board should be insisting that you do that – and be concerned if you don't." ■

OPINION

How can we speak up?

To make a difference in the dramatically changing world, we need to be able to navigate narratives, privilege and power, says Aya Chebbi for Acevo's *30 things to think about*.

WRITTEN BY AYA CHEBBI, FOUNDER OF THE AFRIKA YOUTH MOVEMENT

For the next few decades, the world will continue to be constructed around narratives. Who shapes the narratives? And whose voice is heard?

Take young people as an example. Last year I researched youth radicalisation, carrying out a comparative study between Al-Shabaab's recruitment in Kenya and Daesh's recruitment in Tunisia. My most important finding was that the victimhood narrative of marginalised youth is contributing to youth radicalisation.

The victimisation narrative is used by extremist groups to recruit and sustain support. Many young people have internalised the idea that they are marginalised and are perceived to be heroic when they join these violent groups. We need to start asking ourselves, are we contributing to narratives of empowerment or disempowerment? Do we offer counter-narratives, or create new narratives about youth leadership, participation and agency?

There are currently two ways the development sector talks about young people – as the beneficiaries of "youth development" or as participants of "youth-led development". It is often not clear whether as a group, young people are portrayed as the problem or the solution.

The number of young people will double in the next few decades. The first step to youth empowerment is to change the narrative, from young people being subjects of development to drivers of it/

More widely, we are regularly exposed to narratives of misogyny, violence and exploitation, sometimes without any alternative world view. Narratives become a place of belonging and identity to many. It is crucial to provide alternative narratives to the current challenges and the unknown future.

If you are reading this, it means you are one of the 52 per cent that is privileged to be online. Forty-eight per cent of the world's population is offline. We can talk about digital transformation as an innovative force but digital is also a privileged, closed, elitist space. Information is power and that power is vastly unequal, depending on who can access information and control connectivity and who cannot.

Those who are disconnected can be invisible outside the radius of the digital revolution. Those of us online have a responsibility and opportunity to make a difference. Making our voices heard doesn't mean speaking on behalf of people. Instead it means elevating and amplifying the voices of the most vulnerable. The online space can be a breath of freedom, especially in repressive societies and civic spaces. Therefore, we need to anticipate when the digital divide will grow or close. And what are we doing about it in relation to gender? Or development? What are the online and offline spaces we need, to ensure that privileges of accessibility become rights for everyone? It's like making culture available to everyone and not just to those who can afford festivals.

To make a difference, we need to believe in people's power. Their power not to watch and blame the system, but to change it. Their power to better humanity not destroy it. Their power that leads from a place of love to bring about healing and mend the broken spaces of our world.

The most powerful power of our time is transnational solidarity. There is political power, economic power and there is the power of working together to accelerate change with the tools and talents we have acquired. In the globalised world with shades of oppression, our voices will only be effective if they are unified and collaborative.

While the world is becoming a global village, border policing is increasing, painting an insecure future. The bond of solidarity can be forged or destroyed. Therefore, the more we build on the power of solidarity, the more we will be ready for the future. The struggles of the next decade will require transnational solidarity.

To celebrate its 30th Birthday, Acevo collated 30 things to think about from 30 different voices from around the charity sector. To find out more, visit 30thingstothinkabout.org. ■

OPINION

Leading under pressure

During challenging times, leaders need to be able to manage doing more, with less. WRITTEN BY VICKY BROWNING, CEO OF ACEVO

Civil society breathed a sigh of relief this year as the seemingly relentless press hostility of the previous 18 months significantly lessened. But complacency on this front is both dangerous and premature: the eyes and ears of the print and broadcast media remain on the sector.

Indeed, earlier in 2017, civil society was able to articulate its impact with more than a day's worth of BBC charity-themed coverage, which led to #charitytoday being among the top trends on social media. But public opinion remains fragile and easily provoked by poor practice. The media is alert to every opportunity for criticism, merited or not.

And then there's the Lobbying Act. Civil society was rightly outraged when Chris Skidmore from the cabinet office revealed the government would not be implementing any of Lord Hodgson's proposed reforms to the Lobbying Act. This came despite cross-party support for these reforms, which were recommended in a report that the government had itself commissioned.

It was clear to me and many others during the last General Election that some charity leaders felt inhibited in campaigning because of the Lobbying Act. I know because I spoke to them. In many instances, campaign reticence was informed by fear rather than legal fact.

But both Greenpeace and Friends of the Earth were fined for falling foul of the Electoral Commission. Even though the first of these penalties was for an explicit act of civil disobedience, they served to fuel fear. And no matter how strongly ACEVO and others encouraged sector leaders and others to campaign it was clear that people and organisations felt muted.

Even the organisations that did register with the Electoral Commission – the Quakers being one of only five charities to register as lobbying organisations – found the processes onerous and resource-intensive.

The government's decision to endorse the Electoral Commission concerns about Lord Hodgson's reforms is unfinished business. Particularly as no-one in the sector or the country can now ever be sure whether we are less than a year away from a General Election and the additional regulatory implications that carries.

ACEVO, together with others in the sector, is engaging with the

Commission and government and will continue to press for the clarification or removal of legal ambiguities which inhibit campaigning. This campaign is not over.

I take some comfort from the minister for civil society following the decision to abandon Hodgson. She issued a statement in which she recognised the critical contribution that the sector makes to democracy and said she would support charities and help them campaign with confidence.

This, together with her commitment to producing a civil society strategy through dialogue with charity leaders, gives me some sort of optimism that our voice will continue to be heard. I say 'some sort' because so many uncertainties remain.

Not the least of which is Brexit. As I write, there's impasse in Brussels over the divorce bill and the House of Commons is crawling line by line through the Repeal Bill. The concerns of ACEVO's members, which became evident after the referendum, remain. The dent put in foreign aid by the drop in the value of sterling, the eventual loss of funding currently provided by Europe, the recruitment and retention of foreign staff, the possible loss or dilution of working, environmental and human rights currently enshrined in European law. Of all of these I suspect it will be the staffing issue which affects UK civil society the most.

ONE OF THE GREATEST CHALLENGES FACING SECTOR LEADERS RIGHT NOW IS THE FOG OF UNCERTAINTY AND THE PACE OF CHANGE.

It was US president Franklin Roosevelt who, during the period of significant uncertainty that was the Great Depression, said: "The only thing we have to fear is fear itself." One of the greatest challenges facing sector leaders right now is the fog of uncertainty and the pace of change, whether that's digital, societal or regulatory.

The sustained pressure the sector faces has sometimes led to exaggerated caution. Leaders have sometimes felt under siege, not just by the regulators, but from trustees nervous that they may not be dotting all the Is and crossing the Ts.

But leaders take decisions – that's what they do, irrespective of uncertainty. And it's not as though we don't have things to do. We have to manage the daily frustrations of doing more with less.

We have the persistent injustice of a skewed public service commissioning process which undervalues social value. We have to make a major adjustment to our approach to data with the introduction of GDPR. We have the challenges of Brexit and the opportunities that may develop from the civil society strategy. But there's one thing we should address immediately.

We should stop using word of mouth to recruit nine out of 10 people to our boards. Separate surveys conducted by ACEVO and the Charity Commission reveal huge diversity, gender and equalities deficits. There's no doubt that this needs to be dealt with – we can decide to change this now irrespective of the volatility of the world at large.

Uncertainty should not be synonymous with indecision or stasis. It should not be allowed to be the enemy of collaboration, innovation and openness. These are the qualities essential to maintaining the delivery of services to beneficiaries and commitment to causes. These are the qualities which should be evident in and among our leaders. ■

OUTLOOK

Outlook 2018: The governance agenda

The charity sector has a great chance of making fundamental changes to the way charities are governed, but it's going to take monumental effort and resources moving forward.

WRITTEN BY LOUISE THOMPSON, HEAD OF NOT FOR PROFIT POLICY, ICSA: THE GOVERNANCE INSTITUTE

The *Taken on Trust* report, published during Trustee Week 2017, helped to cap another year where charity governance has been front and centre, and not always in a positive way. Fundraising practices, administration costs and that well-known charity collapse continue to attract interest from the wider media.

But 2017 wasn't a complete governance wreck for the sector. Several important activities helped restabilise the sector's governance:

- The Law Commission's report and draft bill provided some excellent and welcome proposals to help make life easier for trustees, though with that small thing called 'Brexit' ongoing it is unlikely to gain much parliamentary traction;
- The House of Lords report came out, with some very positive words and sensible proposals;
- The revised Charity Governance Code was published and attracted favourable comments, though the sector still requires some assistance if it is to be implemented successfully;
- Civil Society Futures held a long conversation about the future of the sector, and it is likely that the final report (due in 2018) will highlight a number of governance opportunities.

Of course, the standard of governance in other sectors has also attracted attention, with calls for change and self-reflection to deliver improvements. Each of these will have an impact on charity governance, to varying degrees, but of particular note are:

- UK Sport's Code for Sports Governance, which has broken `new ground by becoming the first mandatory code: colloquially termed 'comply, or else' in that public funding is dependent on compliance. This has certainly attracted some attention, and sporting governing bodies are going to be coming to terms with it for another few years;

- The government's response to its green paper on corporate governance could see the UK Corporate Governance Code updated, especially in terms of stakeholder representation, executive remuneration and extending its oversight to large private companies.

While the travails of the charity world leave little cause for celebration, they have created an environment where we have the best chance in a generation to make fundamental developments in the way the sector is governed. Unfortunately, it is still going to take a monumental effort, and resources.

Guidance

For many critics, charity governance guidance has been seen as overly dry and technical: focussing too much on paper (policies, procedures and protocols) rather than on people (behaviours, diversity, values and ethics). The revised Charity Governance Code certainly embraced that criticism and made fundamental changes, making boardroom effectiveness and diversity full principles. It also recognises that codes only go so far in influencing behaviours and culture and that we need to do more of if we are to drive continuous governance improvement in charities, which is where the anticipated change in the Charity Commission's operations is to be welcomed.

A change in personnel is often cited as a quick way to change an organisation's culture. With a new chief executive and chair, it has not gone without notice that the Commission has committed to improving its guidance, working with the sector to help improve trustee diversity and to 'focus not simply on the knowledge base trustees must hold, but also on the behaviours and culture that make for good governance.'

Sector governance

Sector governance however, faces the same challenges as individual charities in making the case for investing in such activities. The Taken on Trust report highlighted that 10 per cent of respondents felt there was no need for governance skills on their board. This has to be challenged, not just with anecdotal evidence and good practice, but with hard data that proves good governance adds value to the work of the charity and ultimately creates a positive impact on the charity's beneficiaries and other stakeholders.

This will be difficult, as even in the corporate sector it is hard to pin down research that proves a concrete link between good governance and an improved bottom-line, let alone a triple-bottom line. ICSA is keen to work with others on academic research that can help to make the case for good governance in delivering charitable purposes and demonstrating that link, but it requires more than arbitrary values attached to accepted governance practices resulting in a performance table or index.

If we are to tackle the indifference to good governance in the sector, the sector needs to collaborate to meet those challenges, and it must do it with the Charity Commission. Soft and hard levers, consistent messages using various media and language, and practical examples of the benefits of good governance need to be deployed for maximum impact. This will need investment for the short and long term.

The steering group behind the Charity Governance Code (ACEVO, AoC, ICSA, NCVO, SCC and WCVA, with the Charity Commission as observer) continue to collaborate on promoting the code, and good governance in general. Specific areas of action include further clarification or guidance, e.g. an example of reporting the application of the code in the trustee annual report. However, we do not want to be seen to be supporting 'boilerplate' statements as these offer very little in terms of explaining the governance in each individual charity; guidance on diversity reports; and more emphasis on balancing the long-term interests of beneficiaries with those of other stakeholders.

Taking action

Various organisations are producing guidance and toolkits to help charities implement the code; some will be free.

Producing the code is only the start of the hard work, the steering group are now looking at how to put the code on a more sustainable footing. Further funding is required to help promote take-up of the code and develop baseline research to measure impact.

Furthermore, developments in the UK Corporate Governance Code will be monitored with a view to any impact it will have on the current code. This could mean it is revised in the next two years to make sure it keeps pace with governance developments in other sectors that apply to charities. Furthermore, as the code encourages charities to do, the steering group is reviewing its composition – like all committees we need to ensure we have the right skills, competencies and knowledge to drive the code forward. ■

OUTLOOK

Outlook 2018: The finance director's agenda

It's set to be another hectic year in the finance department

WRITTEN BY JOE LEPPER

Charity finance directors face a tough year ahead as they prepare to tackle a raft of potential threats to their financial security from politicians, criminals and even their own staff.

Top of their bulging 2018 in-tray is Brexit and how it will affect charities' coffers.

With details of the exit deal still a long way from being hammered out, the Charity Finance Group's director of policy and engagement Andrew O'Brien warns that charities run the risk of "getting paralysed" by the huge number of possible outcomes.

Instead, he urges finance directors to "focus on the practical, charity related outcomes" in areas where change is a certainty, even if the precise outcome is unknown. Charities should then put in place "stress tests", says O'Brien, to see whether their finances and specific projects are robust enough to cope with certain scenarios.

"We don't know what the deal with Brexit is. But we do know, for example, that there will be a reduction in EU nationals in the UK workforce, which will have an impact on salaries, recruitment and retention," says O'Brien.

Those involved in social care need to pay particular attention to EU workforce issues. According to the National Council for Voluntary Organisations (NCVO)'s 2017 UK Civil Society Almanac, this sector accounts for the largest proportion (40 per cent) of EU nationals working in charities as of June 2016.

Charities dependent on EU suppliers also need to be prioritising such scenario planning, says Charles Worth, the Institute of Chartered Accountants in England and Wales (ICAEW)'s head of business law.

"Even with current uncertainties, they can usefully plan for different outcomes, for instance preparing to switch to UK suppliers in case supplies from the EU are disrupted or costs increase as a result of any new tariff regime," Worth says.

A rise in cyber-crime is another potential risk finance directors need to prioritise in 2018, with two thirds of all fraud now committed online, according to crime prevention charity the Fraud Advisory Panel.

However, a Department for Digital, Culture, Media and Sport study released in August suggests many in the voluntary sector are ill-prepared after finding widespread variations in cyber crime awareness across 30 interviews with charity representatives.

Fraud Advisory Panel manager Mia Campbell says: "Charities need to take these risks seriously. Fraud flourishes where there are weak controls and poor governance. If your trustees or CEO don't care about fraud, the chances are no one else will either."

Threats include ransomware, where fraudsters threaten to publish or block access to data unless a ransom is paid. Phishing emails, which look to trick people into disclosing usernames, passwords and bank details, is another, as is invoice fraud, where criminals pretend to be a supplier and ask for urgent payment.

O'Brien urges charities not to panic and ensure they can counter ransomware attacks by backing up data and to ensure any requests for payments are double checked. "I know one charity that suffered a ransom ware attack but they didn't panic. They had backed up the data so just ignored it," he adds.

Improving password security should be another priority, says Campbell, who advises different ones are used for different aspects of

the business.

Staff and volunteers should also receive cyber crime prevention training and a "fraud response plan" should be put in place, says Campbell, to deal with threats as soon as they emerge, "so that everyone knows what to do and when, especially in the 'golden hour' immediately following the discovery of a fraud".

Such training also helps prevent an attack, says Charity Commission head of development, Alan Bryce, and operational intelligence, as "fraudsters will consider if staff and volunteers are less likely to challenge before striking".

Over the next year, finance directors also need to tackle the uncomfortable issue of fraud from within their organisation. Charity Commission research released last month found that a third of fraud among charities is likely to have been perpetrated by staff, volunteers or trustees. The highest loss reported was £1 million, with poor financial controls and inadequate governance making it easier for internal fraud to be carried out, the Commission found.

"Wishful thinking doesn't work," says Worth. "Charities need to be hard-headed about this and ensure they have the best possible policies and procedures in place to prevent internal fraud."

Combating internal fraud, which also includes inflated expense claims and misusing charity credit cards, should also be an organisation wide mission, says Campbell.

"Your staff and volunteers are often the eyes and ears of your charity. They should be given tools and training to recognise the tell-tale signs of fraud, know how and where to report any concerns and what will happen when they do. Give them confidence to report by providing a safe way for them to do so," Campbell adds.

Campbell also recommends charities have a clear anti-fraud, bribery and corruption policy and code of conduct in place, which sets out the behaviour expected of staff and stakeholders.

Over 2018, finance directors are also urged to ensure ongoing issues are not forgotten – including the importance of sound financial reporting.

Charity Commission analysis released in September 2017 found that 97 charities, with a combined income of around £195 million, filed accounts that included a formally modified audit opinion, which is a statement that the accounts are or could be materially misstated.

Issues raised included incorrect property or investment valuation or a failure to include pension liability.

"In many cases, the charities had simply failed to keep proper account records, including evidence of income and expenditure. It is essential that finance directors, and the trustees as a whole, have proper oversight of the accounts," says Worth.

Finance directors also need to ensure that financial reporting details how the charity is working for the public benefit, Charity Commission head of accountancy Nigel Davies adds, who says around half are failing to report this.

"What you are doing to further your aims and who you are helping should be central to all a charity does and should be clearly and transparently reported," Davies says.

NCVO director of planning and resources Susan Cordingley also urges finance directors to pay attention to how financial reports are presented, to ensure they can be clearly understood by the public.

"They need to tell the story and not just present the complex detailed numbers. Maybe use graphs or visual formats and link financial information to the narrative so the public can clearly see what difference the charity is making," she says.

Pension liability also needs to remain a priority for finance directors, says O'Brien, with appropriate planning needed to take into account economic changes as well as making sure funders and commissioners are aware of the pension commitments.

In addition to this, 2018 will see the first review of charity taxation for 20 years. This is being coordinated by the Charity Tax Commission, which was launched by the NCVO in November to gather views from the sector and make recommendations for government. It is set to report in 2019 with calls for evidence set to take place next year.

Treasury and HMRC representatives are part of the commission as observers, which Cordingley says is important as "if they are involved in it from the beginning then it is more likely they will listen to the outcome".

One of the commissioners, Dan Corry, who is also chief executive of New Philanthropy Capital, says it is vital that financial directors make their view known. "The Commission needs the thoughts and expertise of finance directors, among others, to help it come to conclusions that are right, fair, and have involved the whole sector," he says.

With charity taxation under review, a heightened threat of cyber crime, uncertainty around Brexit and continuing concerns around pension deficits and financial reporting, 2018 looks set to be a hectic year for finance directors. ■

OUTLOOK

Outlook 2018: The fundraising agenda

A developing regulatory regime and ongoing technological changes will keep fundraisers occupied in the year ahead

WRITTEN BY MATT RITCHIE

New approaches and oversight structures continued to bed in this year after a time of profound change in the charity fundraising space.

However, further change is coming in 2018. Fundraisers must be mindful of how regulatory developments will impact them, and be awake to the opportunities new and existing technologies present.

Regulation

The Fundraising Regulator took responsibility for oversight of fundraising from July 2016, and has now established processes and launched major initiatives like the Fundraising Preference Service that went live this summer.

The regulator in November welcomed the registration of the 1,000th charity outside the scope of its levy, on top of 1,400 larger charities that have registered and paid the levy.

Responsibility for the Code of Fundraising Practice now sits with the new regulator, and changes to the code were announced this year.

Institute of Fundraising policy manager Stephanie Siddall says the organisation is pleased with the positive start the Fundraising Regulator has made since launch.

"We particularly welcomed the Fundraising Regulator's wide consultation on changes to the Code of Fundraising Practice earlier this year, in which they took many of the sector's comments and suggestions on board. We're optimistic that this will be repeated," she says.

The institute would like to see further positive engagement with the sector in 2018, and in particular is keen for the regulator to conduct a review of the way complaints data is collected and presented.

Fundraising Regulator head of policy and communications Gerald Oppenheim says the regulator always understood the importance of working with the sector and consulting charities, something made even clearer during its first year of operation.

"Whether it has been the development of the code or the creation of FPS, charities' feedback has been invaluable. We recognise though that as our role is also to support the interests of donors and the public more widely that we need to find ways to engage with them and build on the workshops we ran in 2017."

Oppenheim says priorities for 2018 include continuing to update and reorganise the code, carrying out casework and sharing learnings, and monitoring progress and outcomes from the FPS and adjusting it as needed.

GDPR

Another separate regulatory issue is set to play on the minds of fundraisers next year after featuring highly in discussions in 2017.

The General Data Protection Regulation (GDPR) from the EU will replace the 1998 Data Protection Act (DPA) from May 2018, and is designed to give individuals greater control over how organisations collect and use their personal data.

The implications for the charity sector are wide ranging, and are expected to be particularly felt in fundraising circles.

Oppenheim says GDPR will be a priority for the regulator next year. Further outreach is planned for 2018, and the regulator is consulting on changes to the code to bring it in line with GDPR.

"We have already hosted an event, printed guidelines and spoken to charities about the regulation, however it will become even more pressing next year."

Siddall says most charities are working to prepare for the changes, but an IoF survey conducted over the summer revealed a need for much more support. This is particularly true for smaller organisations.

Technology

Technological innovation is increasingly changing the fundraising landscape and this will continue apace next year.

British Heart Foundation director

of individual giving and product marketing Nick Georgiadis says the charity will always take opportunities to use technology to provide a better experience for supporters.

"We've already done things like incorporate fitness tracking in our existing fundraising products, like MyMarathon, and we're looking to further understand how we can use Artificial Intelligence to develop improved supporter journeys."

Cancer Research UK executive director of fundraising, Ed Aspel, says CRUK continues to evaluate how new payment methods can help supporters donate to the charity, using new solutions alongside traditional donation formats such as cash and cheque.

"We've introduced contactless donations for street collectors, in our shop windows, at till points, and we've even launched contactless benches in London. We've also launched ApplePay for website donations. SMS donations have been around for several years and donations through mobile payments are on the rise."

CRUK has also built its own product for fundraisers in the form of its Cancer Research UK Giving Pages, aiming to enhance supporters' experience and provide a personalised journey.

"Over the coming year we will continue to make it even easier and more rewarding for supporters to fundraise online," Aspel says.

Social media

Social media forms an integral part of how charities communicate with stakeholders of all types.

BHF's social media manager Athar Abidi says a key role of platforms like Twitter and Facebook is in providing a personal connection to those who raise funds for the charity.

Ensuring all fundraisers the charity engages with online are treated equally is an important part of this, he says, rather than only recognising those who raise a lot of money or post content that looks polished and professional.

"If somebody uploads a photo taken on their phone so much the better, because that's actual social media content," Abidi says. "Social media is where we can bring the charity down to ground level. We've got the resource to do those little touches and it makes a big difference to our eventers and it really reminds people that we care."

BHF is this year rolling out a software system to enable the charity's local social media accounts to upload content that can be easily approved by the central social media team. This enables social media to have a role in local engagement, while ensuring consistency of the charity's messaging.

Abidi says seeking to engage social media influencers with smaller followings than the likes of the star YouTubers with huge networks is also an increasing trend.

Aspel says adoption of the charity's opt-in policy and developments to platforms' algorithms mean CRUK is constantly reviewing and adjusting its social media strategy.

"The next 12 months will no doubt throw more challenges at us, for example with Facebook's rumoured split feeds," Aspel says. "While organic social remains essential for us to continue engaging our followers, social media keeps moving towards a pay-to-play model. Therefore we will continue to integrate a test and learn approach in all our social media activity to make sure we get the most out of our efforts and budgets."

Retail

The charity retail sector has enjoyed a positive year in 2017, and there are hopes charity shops perform strongly in 2018. However, new challenges are expected to put pressure on the space.

"The twin challenges facing all charity retailers of rising costs and attracting sufficient volunteers means total sector shop numbers will probably decline slightly in 2018, as individual shop performance and expansion plans come under close scrutiny," says Mike Taylor, retail director at BHF.

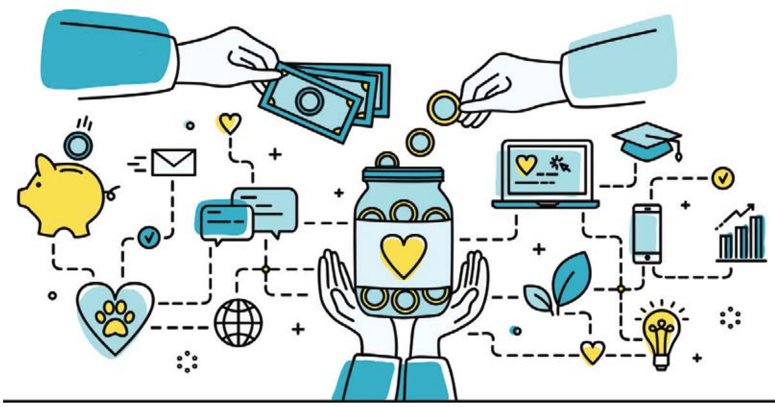
Similarly, CRUK's Aspel notes the national living wage, the apprentice levy, and challenges in recruiting sufficient numbers of quality volunteers may represent headwinds.

"Through our shops we're encouraging and driving greater levels of engagement with health messaging and awareness with communities across the country. Examples include having cancer information rooms in shops which give shoppers the opportunity to contact a cancer nurse in privacy," Aspel says.

Technology is increasingly playing a greater role in charity retail too, and Taylor says he expects this to continue through into 2018 and beyond.

"The key opportunity for the sector is to use the ever expanding number of digital channels and social media to attract volunteers and donations and sell these to the widest possible market," he says.

"Low cost and ease of use of platforms such as eBay for Charity help create a level playing field which many charities of all sizes are exploiting with great results." ■



What is the future of fundraising?

Charities need to innovate and offer new experiences to their donors, supporters and volunteers.

WRITTEN BY LYNDA THOMAS, CHIEF EXECUTIVE OF MACMILLAN CANCER SUPPORT, FOR ACEVO'S *30 THINGS TO THINK ABOUT.*

If civil society wants to remain relevant, we need to tackle several fundraising challenges head on.

Public sector cuts mean that the third sector needs to provide more support and services than ever. This means raising large amounts of money in a sustainable way in order to continue to deliver for the people who need us.

Many potential donors are asking themselves why they should give to charities, instead of to crowdfunding sites, or direct to individuals. The public is coming forward in huge numbers to give money straight to people who need it, through sites like GoFundMe. I don't want charities to become unnecessary middlemen.

We live in a 24/7 world where people expect to get immediate feedback from brands and businesses. Increasingly, donors want to know the impact of their gift in real time. A great example of this is when you donate blood in England: donors now receive a text message when their blood goes to a hospital to help a patient. People share those texts with their family and friends and feel proud of the tangible effect that their donation has had.

We need to innovate and offer new experiences to our supporters, donors and volunteers. Charities are still catching up in this area and there's so much we can learn from businesses and social enterprises.

This year I took part in a Corporate Strategy Programme at Harvard Business School. I didn't take part in the not-for-profit programmes, because I wanted to have my thinking challenged. My colleagues were from big, global, commercial companies, and I realised that many fundamental principles apply to all sectors.

As a sector, we have a habit of looking at other charities to learn and yes, compete. But to really innovate, we need to look outside. We need to ask ourselves, how can we reach beyond our traditional partners, to learn and work together? Macmillan has been working with the banking sector on new services that support customers who have been affected by cancer. Not only does this give us huge reach to people when they need support the most, it also feels great to be working with businesses towards a shared goal.

By facing these challenges head on, by looking into ways to innovate our offer and by remaining relevant to the public, I think we will be well set to raise the money needed to keep supporting the increasing number of people who need our help, at their greatest times of need. ■

To celebrate its 30th Birthday, Acevo has collated 30 things to think about from 30 different voices from around the charity sector. These thought-provoking insights such as this aim to inspire and provoke debate about how civil society leaders can make a difference over the next 30 years. To find out more, visit www.30thingstothinkabout.org.

TECHNOLOGY

Are you harnessing the power of social media?

Social media is a powerful, great value marketing tool that many charities are using to drive brand awareness and donations and to promote events – but it isn't a magic bullet. You can invest a lot of time and energy on the wrong platform, talking to the wrong audience and giving out the wrong message.

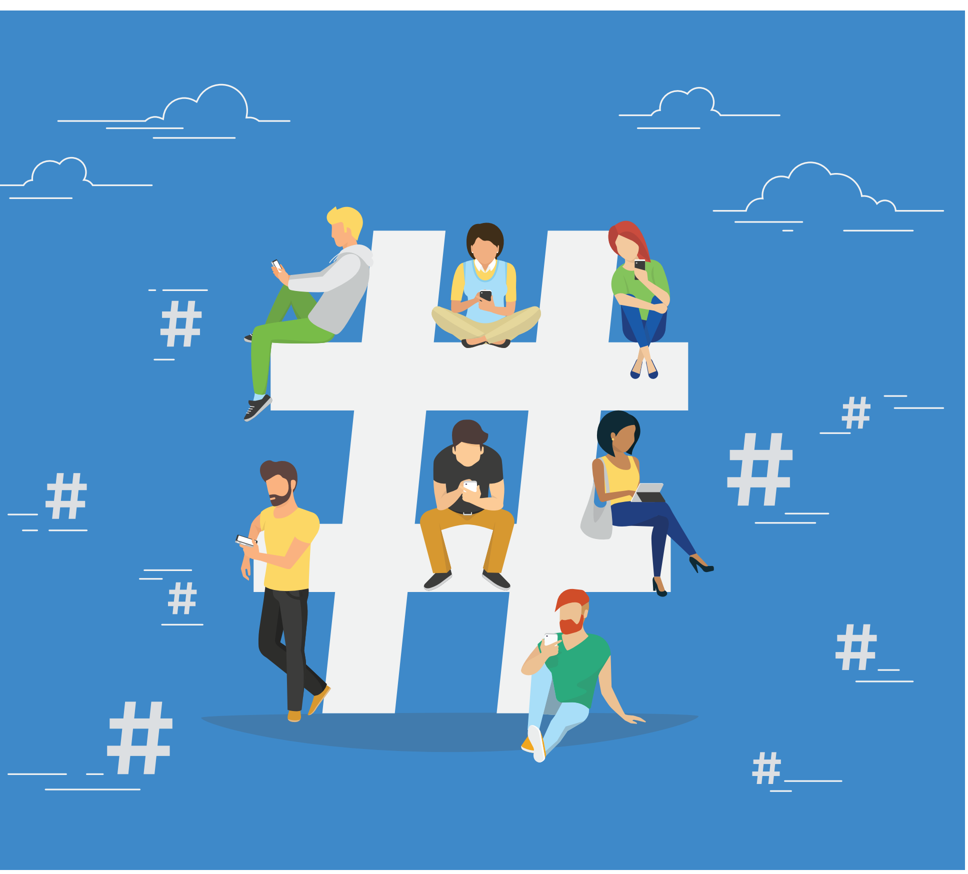
So, how can you ensure you get an R.O.I for all your social media efforts? Firstly, always be clear on your objectives and set out a clear strategy with measurable outcomes so you know when you have delivered or reached the finishing line. Whether you are looking to generate website traffic, fill seats at a fundraiser, get corporate sponsors or recruit volunteers, you need to set realistic targets, with deadlines, to ensure you are delivering the right results, consistently.

Know your audience

Always clarify your target audience. What is their demographic? Are they parents, business people, club members? Which social media platforms are they using? Why and when? If you need to reach young people you might find that Instagram delivers the best impact, equally Twitter can make an efficient way of, reaching local businesses, thought leaders, bloggers and journalists. So make sure you know who you're aiming for.

Ensure you create, and agree with your internal stake-holders, a consistent tone of voice for your copy or words. Whether it is cheeky, challenging, professional or corporate – you are building a brand presence and every post needs to reflect your core brand values. Be very cautious about being overtly political or religious unless you have agreement from the management team that this is right for your charity.

Consider creating a social media content plan, to scope out your messaging across the next quarter, or even the full year. What festivals, sporting events, hashtags or



Social media can boost brand awareness, act as a tool for fundraising and increase donations, but one size doesn't fit all.

WRITTEN BY JO BAYNE, FOUNDER OF SWEET CHARITY international days can you use to drive engagement? Take for example #CharityTuesday or #Mentalhealthawareness. By using hashtags, you can increase your brand reach, get more followers and drive more engagement

Preparation is the key to success

By being organised, you can increase your efficiency and maximise your focus. The more experienced charities like Home-Start Herts carefully plan its content and use scheduling tools like HootSuite.com. Are you using lists to manage your Twitter news feeds to ensure you don't miss out on great content, or the chance to comment, like or share?

Successful social media managers always ensure their content is useful, informative, topical and entertaining. Take for example the Ice Bucket Challenge. No one could have predicted the global success of such a silly campaign idea – one that even got President Barack Obama involved. Once people engage with your posts, you can start a conversation to create traction. Importantly, always be human, friendly and bring some personality to your posts so people remain interested and don't choose to unfollow you.

It's vital to ensure you are consistent on social media, regularly posting updates, sharing other users' content and liking updates so your audience see the value in engaging with you.

Add eye-catching photos or illustrations with your posts, after all, a picture speaks a thousand words. Don't forget to feature your charity logo or website URL and ideally, a "call to action". Canva.com is a great design tool if you have no budget for a graphic designer.

Try to use video to humanise your business and showcase your events or introduce your team. Additionally, interviews are a great way to let your trustees share their vision and values.

IT IS VITAL TO ENSURE YOU ARE CONSISTENT ON SOCIAL MEDIA, REGULARLY POSTING UPDATES AND SHARING OTHER USERS' CONTENT SO YOUR AUDIENCE CAN SEE THE VALUE OF ENAGING WITH YOU

To seriously boost your brand awareness, there are plenty of opportunities to boost your post impressions by creating highly targeted ad campaigns or promoting your posts through paid-for ads. You can even re-market to loyal fans or previous website visitors to increase brand awareness and conversion (conversions could be obtaining donations, newsletter sign-ups, volunteers etc.).

If you work for a smaller charity with limited time and budget, you should not be afraid to recycle content by tweaking messaging or re-using the same content later in the year – just don't overwhelm your followers with the same types of posts across all platforms over and over again. Don't assume that just because you have a very small team or are a start-up charity that social media is not the right tool for you. By harnessing the power of Twitter, a new mental health charity, The OLLIE Foundation, was able to raise its annual fundraising target in five months and generated inbound calls to ask for the founder to be featured on national TV & Radio.

Measuring results

Social media can take up a lot of time that could be better spent in other areas of your charity. To ensure you are investing your time wisely, use analytical tools to evaluate your efforts. Do more of what works and ensure you increase engagement, drive web traffic and donations. The following are just a few ways you can measure results:

- Track audience growth through the number of likes and followers.
- Analyse audience demographics by monitoring the gender and location of your followers.
- Monitor visibility or impressions by the time and post type.
- Evaluate engagement, shares, re-tweets.
- Use Google analytics to understand impact of website visits.

Charities can get great insight and inspiration by monitoring their competition and testing and trying out new creative ideas and technology e.g. GIFs or Facebook Live. Save The Children was an early adopter of live video to deliver a human connection through storytelling and has since seen impressive results in terms of building a tribe of highly engaged charity advocates. Each 'like' and share your post gets is expanding your reach and generating social proof to friends and family that yours is a trustworthy charity that delivers positive outcomes. Your direct social media followers or community is effectively doing your marketing for you.

Don't be afraid to stop – social media is not a one-size-fits-all solution. Your efforts may be better invested elsewhere. ■

OUTLOOK

Investment in 2018

A look at some of the factors set to shape charity investments in the year ahead WRITTEN BY

LAUREN WEYMOUTH,
EDITOR, CHARITY TIMES

It comes as no surprise that politics was a huge driver in the investment market in 2017. With the uncertainty surrounding Brexit looming, many charities were faced with the difficult task of having to prepare for and react to the unknown.

New research revealed charities are likely to lose millions in EU funds due to Brexit, meaning it is more important than ever charities look to invest their money wisely.

Psigma senior investment director Andrew Wauchope says the key investment trends for charities in 2018 will be determined by the answers to two questions their trustees need to ask themselves: can they realistically expect the same returns in 2018 as they saw in 2017? And do they need to review the amount of risk they are taking and position their portfolio for different market conditions?

"Market predictions for 2018 certainly look less positive than 2017," Wauchope says. "The last few years have seen investment returns supported by a potent cocktail of central banks buying of assets, an abundance of cheap money, improving investor confidence, a synchronised global economic expansion and very low levels of volatility."

He explains how many of these factors have lured charity investors into higher allocations to riskier investments, such as equities, in pursuit of higher returns.

However, investors should expect much more volatility in sentiment linked to Brexit, Epworth chief investment officer, Stephen Beer notes. "As negotiations between the UK and the European Union continue, establishing a post-Brexit trading relationship favourable to the UK will be challenging," he says.

"Sterling will be affected by the changing prospects and ongoing uncertainty is negative for growth, business investment, and government borrowing."

Positive world economy

Despite political uncertainty, the world economy is enjoying a "synchronised upswing", and most regions are actually generating good growth, despite political upsets in some parts of the world, Schroders chief economist and strategist Keith Wade explains.

"As a result, we have upgraded our global growth forecast for 2018 to 3.3 per cent from a previous estimate of 3.0 per cent. This marks a modest acceleration from 2017, which is also upgraded to 3.2 per cent from 3 per cent. If correct, this would make 2018 the strongest year for global growth since 2011," Wade adds.

He notes that the year ahead could see the "Goldilocks combination" of better-than-expected growth and weaker-than-expected inflation. "Structural factors such as the effect of technology remain important, but cyclical forces suggest that inflation will begin to catch up with the strength of economic activity next year," he says.

Factors to consider

However, Beer explains there are five key factors charities should consider. "First, years of spending cuts have highlighted inequality in advanced economies, which may lead governments to boost investment to drive growth and increase the role of the state at the expense of markets.

"Second, despite rises in interest rates in the US and UK, monetary policy remains easy and central banks will need to tread carefully in

AS NEGOTIATIONS BETWEEN THE UK AND THE EU CONTINUE, ESTABLISHING A POST-BREXIT TRADING RELATIONSHIP FAVOURABLE TO THE UK WILL BE CHALLENGING

their journey towards 'normalisation'; third, the debate about bond yields will get closer to resolution as the effects of the financial crisis continue to be felt but longer term trends put upward pressure on interest rates."

He adds that high valuations of some 'riskier' assets, such as some equities, will be tested as investors look for them to be justified by growth. "We may be experiencing a new technology revolution but the question is to what extent prices have anticipated this," he says.

Finally, he explains how climate change concerns will become more mainstream in 2018. "Studies demonstrate that significant action is required urgently if the Paris Agreement to keep global warming 'well below 2C' is to be met. Investors will need to anticipate this change to avoid being caught out."

Trustee awareness

With an uncertain year ahead, it's particularly important for trustees to remain aware of the risks and remain on top of their game. "Sensible trustees will be keen to keep some of the gains they have made since 2008 but, will still want to grow their assets where they can," Wauchope explains.

"As they have to be prudent stewards of their charities assets, 2018 should see charities look at dialling down risk by diversifying into a wider range of asset classes and embrace different investment styles or raising the amount of cash they hold."

"In 2017 charities and other investors have fared well. However, it should be a reminder that we need to manage risk now rather than wait until markets deteriorate. Unless we do, our charities will lose many of the gains they have made and may be unable to meet their funding commitments." ■

INVESTMENT

Multi-Asset Funds	Investment Manager	Fund Size (£m)	Cash %	Bonds %	Equity UK %	Equity Intl %
Barclays Charity Fund	Barclays	164.9	1.6	14.5	45.1	29.3
The Targeted Return Fund	Barings	84.6	10.2	27.5	15	36.1
Armed Forces Common Investment Fund	BlackRock	328.7	-5.8	12.7	37.6	43.2
Charifaith	BlackRock	156.4	6.5	11	39.4	30.5
Charity Multi-Asset Fund	Cazenove	544	3.9	1.4	32.6	30.7
CBF Church of England Investment Fund	CCLA	1,270.80	5.5	0.4	23.8	49.1
COIF Charities Ethical Investment Fund	CCLA	393	8.6	0.9	25.2	47.2
COIF Charities Investment Fund	CCLA	2,015	8	0.3	22.9	48
Amity Balanced Fund for Charities	EdenTree	23.5	0.4	34.4	36.5	24
National Association of Almshouses CIF	M&G	181	4.9	13.3	53.3	28.5
Newton Growth & Income Fund for Charities	Newton	735.5	5.3	12.7	37.5	44.5
Newton SRI Fund for Charities	Newton	103.4	2.7	17.9	31.4	48.1
Newton Growth Fund for Charities	Newton	49	7.4	18	32	41.6
Active Income and Growth Fund for Charities	Rathbones	166.8	8.3	17.1	25.6	30.7
Core Investment Fund for Charities	Rathbones	51.4	0.4	12.9	39.5	35.1
Charity Assets Trust	Ruffer	95.9	14	36	11	32
Alpha CIF for Endowments	Sarasin & Partners	1,755.20	1.9	14.7	27.8	37.5
Alpha CIF for Income & Reserves	Sarasin & Partners	135.1	8	70.3	9.4	9.2

Peer Group Indices1						
Sterling Cautious Charity Index	ARC		23.5	35.3	5.3	5.8
Sterling Balanced Asset Charity Index	ARC		13.8	25.7	21.4	17
Sterling Steady Growth Charity Index	ARC		7.7	18.1	39.1	21.1
Sterling Equity Risk Charity Index	ARC		2.5	10.1	53	22

Market Indices1	
UK Equities	iShares
International Equities	iShares
UK Sovereign Bonds	iShares
UK Corporate Bond	iShares
UK Property	iShares
Cash	-

INVESTMENT

Property %	Other %	Return						Share Class
		Last Quarter	Last 12 Months	YTD 2017	Last 3 Years	Last 5 Years	Last 10 Years	
5	4.7	2.0	11.3	7.0	27.0	-	-	Inc
7.2	4	1.3	7.9	7.7	20.3	36.0	49.6	Inc
8.3	4	1.7	11.6	9.3	33.6	61.2	80.4	Acc
7.4	5.2	2.4	12.8	8.0	30.3	56.8	81.5	Acc
9.8	21.6	1.1	8.4	4.8	23.1	46.6	61.3	Acc
3.4	17.4	1.6	12.1	8.4	38.2	73.5	91.3	Inc
3.4	14.7	1.6	11.7	8.4	35.2	69.6	-	Inc
3.3	17.5	2.0	11.6	8.6	36.7	71.1	84.9	Inc
-	4.7	1.2	8.6	7.6	26.7	50.6	-	Inc
-	0	1.5	9.2	6.3	28.2	64.6	83.5	Inc
0	-	1.5	5.8	7.9	35.8	72.4	101.4	Inc
-	-	1.3	9.6	7.5	28.8	57.1	-	Inc
-	1	1.4	8.4	7.7	32.0	-	-	Inc
8.5	9.9	0.7	10.3	7.5	28.1	43.8	-	Inc
5	7	1.4	-	7.0	-	-	-	Inc
-	7	-0.5	1.7	0.2	15.4	34.1	-	Acc
9.6	8.6	1.3	9.5	7.2	26.4	57.5	78.8	Inc
1.2	1.9	0.3	1.8	2.4	17.0	31.2	68.2	Inc

Source / Asset Risk Consultants

Peer Group Indices1							
2.2	28	0.5	2.7	2.3	10.4	21.6	48.7
2.3	19.7	0.7	6.4	4.4	19.5	38.7	64.8
2.7	11.3	1.2	8.5	6.1	24.7	49.8	72.4
3.1	9.3	1.4	10.1	7	27.2	58.5	75.9

Market Indices1							
		1.8	11.1	6.5	24.7	53.6	66.2
		1.6	14.5	6.7	51.6	104.6	129.7
		-0.5	-3.7	-0.2	17.1	19.5	75.8
		0	-1	2.1	21	32.7	74.6
		-0.1	3.9	3.5	15.3	66.7	0.1
		0	0.1	0.1	0.9	1.6	11.1

Key

[1] The asset allocations presented are based on estimates provided by ARC. The estimates are calculated using statistical methods that attempt to derive a model portfolio whose historical returns most closely match the actual ACI results.

INVESTMENT

Volatility: A risky measure?

There are many kinds of risk, but is volatility the least relevant of them? WRITTEN BY MARK JEFFERIES, DIRECTOR AND GRAHAM HARRISON, GROUP MANAGING DIRECTOR, ARC CONSULTANTS

Investors are familiar with the disclaimer "past performance is not a reliable indicator of future returns" but perhaps "past volatility is not a reliable indicator of future capital loss" should be added to the standard warnings provided to charity investors.

With the headline volatility of equities near record lows and seemingly not reflecting the perception of investors following recent market events, the question of whether current volatility statistics are misleading investors warrants investigation.

In common parlance, the word volatility conveys a tendency to change quickly and unpredictably, often for the worse. For example, a person may be said to have a volatile temper. However, in the world of finance the meaning of volatility subtly changes from being something that is unpredictable to something that can be measured. Thus, the volatility of an investment is not a comment on the unpredictability of the returns from an investment, but a statistic suggesting a predictable range of outcomes. And the most widely used volatility statistics are based on the variability of historical returns.

Most investors understand that the variability of historical returns is an inadequate expression of the current and future risk of holding an investment. However, despite being a poor indicator of risk, the historical pattern of returns is an objective, empirical test that is widely used to analyse the 'risk' of investments.

Figure A

In the Q2 2015 ARC commentary it was noted that the absolute volatility of equities is not a constant. Indeed, the three year rolling annualised 'volatility' of returns for UK equities has ranged between 10 per cent and 20 per cent for the majority of the last fifty years or so. Using current volatility as a measure of potential future loss is a fool's paradise.

The sense of disquiet felt by many investors after an eight year bull market, fuelled at least in part by unprecedented money creation, is a reflection of the fact that most investors understand that the rise in equity markets across the globe cannot and will not continue forever.

The abnormally low price variability currently being observed, as measured by the three year rolling annualised standard deviation of UK equities, doesn't reflect potential losses should economic growth falter and investor sentiment turn.

The current volatility of UK equities suggests that the next downturn may well be statistically a once in a thousand year event, despite drawdowns of 35 per cent or more being recorded roughly once a decade.

Investors willing to take a longer term view understand that volatility measures generally go up after significant drawdowns have occurred not before. They also understand that as a predictor of potential loss, volatility is absolutely useless. The statistics may be recording that price variability of UK equities is lower than its historical average but there are clear signs that investors are becoming ever more nervous that past volatility is not a reliable indicator of future capital loss.

But as commentators have observed, the ongoing bull market has been one that has "climbed a perpetual wall of worry" and few investors are currently overweight equities. Despite the current low level of equity market volatility, the top of the equity bull market may well be several years away.

Volatility can be useful

When determining the methodology for the compilation of the various ARC Charity Indices ('ARC ACI') and the ARC Private Client Indices ('ARC PCI'), the idea of using absolute volatility (the annualised standard deviation of monthly returns) was explored but thankfully discarded. If such an approach had been used, there would be no 'equity risk' portfolios left in the universe; they would all have migrated to "balanced asset". Luckily, a relative approach was adopted and that has worked relatively well.

As a predictor of relative loss for a portfolio when financial markets decline, the volatility of a portfolio compared with the volatility of equity markets is a helpful guide. Although the absolute numbers have fallen, the relative behaviour patterns have been fairly stable.

So why do investors feel risk is higher than volatility suggests?

Three potential reasons are examined: choice of benchmark; currency volatility; and data anomalies

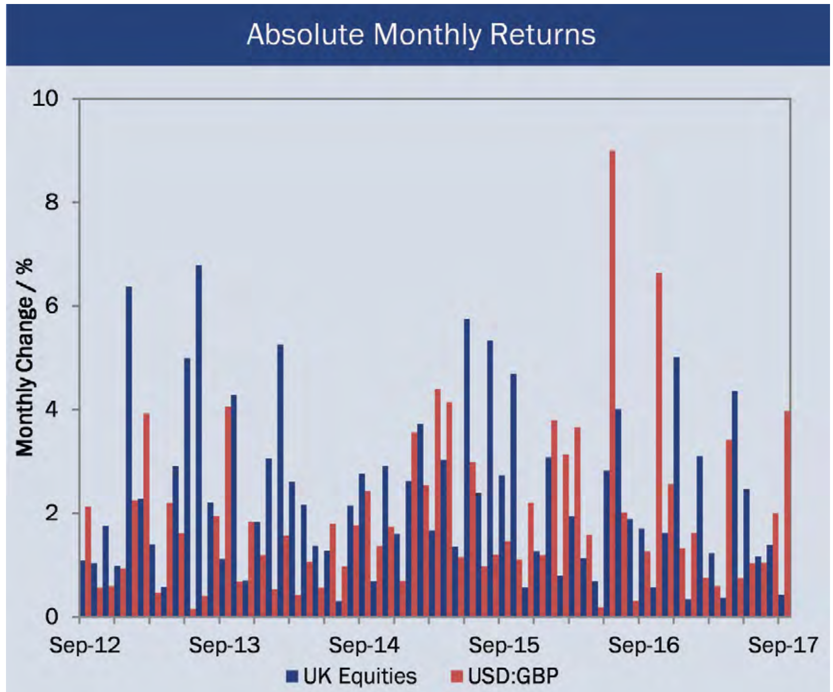


Figure B

Figure C

Choice of Benchmark

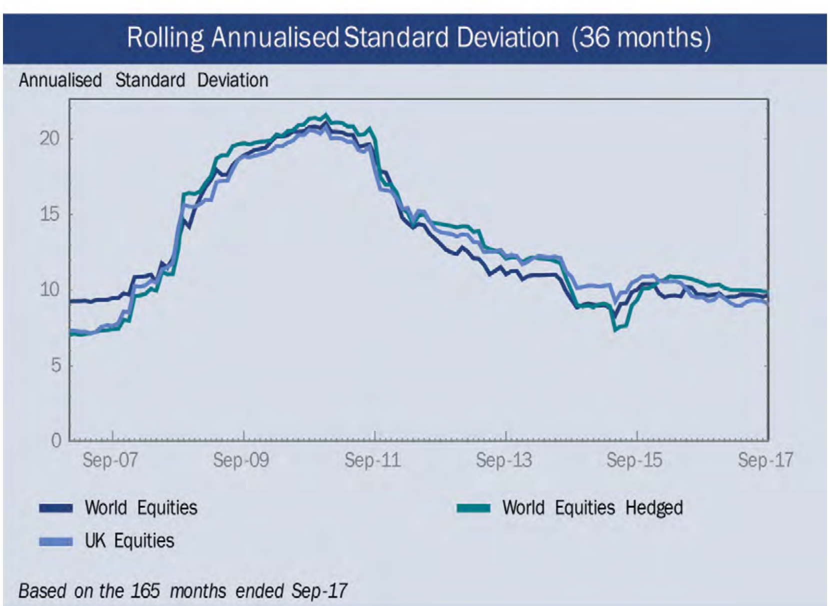
Over the last few years, users of the ARC ACI have questioned what impact there has been on the compilation of the indices as a result of the choice of equity index against which the relative volatility of all contributing portfolios are categorised.

ARC employs a relative risk approach in assessing investment performance and as a consequence, the selection of the equity risk measure impacts the risk categorisation of all portfolios in the ARC ACI. The choice is driven by what is considered a widely accepted equity exposure for investors in that peer group. For example, for the ARC ACI, UK equities are used, given the domestic preferences of many charity managers and their clients, whereas for ARC PCI, world equities are used to reflect the international approach taken by many private client discretionary managers.

The charts included show the cumulative return and volatility of world equities, UK equities and a hedged world equity index since inception of the ARC Indices. The charts reveal that the choice of index: hedged or unhedged; international or domestic, has had a significant impact on cumulative returns.

However, there is a high level of consistency in the level of volatility. As such the classification of portfolios and resulting calculation of the indices would be very similar whichever equity index was taken as the comparator. So if the choice of benchmark, from a portfolio risk categorisation perspective, is relatively unimportant, what might be the problem? In a word: performance.

Figure D



Many charity investment managers have been reluctant bulls and have been relatively under-weight equity markets versus their neutral asset allocations. This has meant that portfolios have struggled to match or beat their index-based benchmarks leaving investors with the impression that financial markets have been very tricky to navigate successfully.

Currency Volatility

A second reason why investors may feel that "risk" is higher than the volatility statistics suggest relates to the recent gyrations of currency markets.

Figure B shows absolute monthly returns for UK equities compared to monthly changes in the USD:GBP exchange rate over the past five years.

For the last couple of years currency volatility has exceeded equity volatility. For many investors, this currency volatility will have been a key influence on their perception of risk given the impact on valuations and their own spending patterns.

GBP weakness has also been a significant driver of portfolio underperformance versus international markets for many investors with GBP as their currency of record.

Data Anomalies

The third reason why investors may feel volatility statistics are under-estimating risk relates to a curious statistical phenomenon that has been evident over recent years: using month-end data to calculate volatility results in a lower number than using daily data or indeed using mid-month data, with current monthly UK equity volatility c.30% below the daily equivalent. In theory such a result should not happen. In practice, such outcomes appear to be engrained, rather like seasonal effects.

Conclusions

Volatility as a measure of investment risk has its limitations. It might even be regarded as being absolutely useless. However, volatility remains a useful measure of relative risk and the results are not particularly sensitive to index selection.

- Whilst volatility statistics do not provide much insight into potential future drawdowns, categorising portfolios according to their relative risk provides information on the likely behaviour of the portfolio in a drawdown event.
- Investors sense that investing in financial markets now carries more risk that volatility statistics are suggesting. They are almost certainly correct. However, there is a cost to sitting on the sidelines.
- Once a (relative) risk budget has been agreed, most investors should avoid significant asset allocation swings and leave market timing to the experts. Selling at the top requires not just skill but a huge amount of luck. ■

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Contact: Tom Rutherford, Head of Charities
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M&G INVESTMENTS

M&G Investments,
M&G Charities Department

PO Box 9038, Chelmsford CM99 2XF

T: Richard Macey 020 7548 3731
or James Potter 020 7548 3882

E: charities@mandg.co.uk
W: www.mandg.co.uk/charities

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*As at 31.03.2016. Issued by M&G Securities Limited who is the fund manager and registered in England No. 90776. The registered office is Laurence Pountney Hill, London EC4R 0HH. M&G Securities Limited is authorised and regulated by the Financial Conduct Authority. Charibond's charity registered number is 271815, and Charifund's charity registered number is 249958.

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INVESTMENT MANAGEMENT

NEWTON Investment Management

Newton Investment Management

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Newton Investment Management
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London
EC4V 4LA

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E: jon.bell@newtonim.com
w: www.newtonim.com/charities

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www.newtonim.com/charities

QUILTER CHEVIOT INVESTMENT MANAGEMENT

Quilter Cheviot

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WC2B 6AN

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E: charities@quiltercheviot.com
W: quiltercheviot.com

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Rathbone Investment Management

8 Finsbury Circus, London EC2M 7AZ

For further information please contact James Brennan:

E: james.brennan@rathbones.com
T: 020 7965 7102
W: rathbones.com/charities

Rathbone Investment Management is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

Rathbones welcomes charities of all shapes and sizes

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Key facts

- £4.1 billion of charitable funds under management
- Over 1,000 charities
- Segregated or pooled investment
- Dedicated team of charity investment specialists
- A history grounded in philanthropy

All figures as at 31 December 2016.

ROYAL LONDON

Royal London Asset Management

55 Gracechurch Street
London, EC3V 0RL

Contact: Alan Bunce, Head of Institutional Business – Direct

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E: alan.bunce@rlam.co.uk
www.rlam.co.uk

RLAM is authorised and regulated by the Financial Conduct Authority.

Royal London Asset Management (RLAM) is one of the UK's leading investment companies for the charity sector. RLAM has built a strong reputation as an innovative manager, investing across all major asset classes and delivering consistent long-term outperformance. RLAM manages over £80 billion of assets, split between equities, fixed interest, property and cash, with a market leading capability in sustainable investing.

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All data as at 31 March 2015.

RUFFER

Ruffer LLP

80 Victoria Street
London
SW1E 5JL

For more information contact:
Christopher Querée, Investment Director – Head of Charities

T: +44 (0)20 7963 8110
F: +44 (0)20 7963 8175
E: cqueree@ruffer.co.uk

Ruffer is an absolute return investment manager. Instead of following benchmarks, we build multi-asset portfolios that aim not to lose money on a 12 month rolling basis and deliver a return greater than the risk free alternative of cash on deposit. By aiming to avoid the cyclical gyrations of the market, we aspire to provide a less volatile experience for our clients. This approach has, over the long-term, delivered returns ahead of UK equities and the WM charities benchmark with less volatility. We manage over £20bn of assets, including over £2bn for over 300 charities as at 31 December 2016. We are able to provide fully segregated portfolios for clients and incorporate ethical restraints, either through a segregated portfolio or through our pooled Common Investment Fund. Our dedicated charities team includes a manager responsible for co-ordinating our ESG policies across the firm. We are a signatory to the UNPRI and regularly host conferences and seminars designed to bring charitable organisations together, discussing the key investment challenges they face.

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INVESTMENT MANAGEMENT

Sarasin & Partners LLP

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London EC4M 8BU

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E: john.handford@sarasin.co.uk
W: www.sarasinandpartners.com

Sarasin & Partners manages approximately 400 charities* with over £6.1 billion in charitable funds*, representing over 40% of the firm's total Assets under Management. We also manage investments for UK private clients, pension funds, and other institutions with total funds under management of £14.2 billion* (*as at 30.06.2017).

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UBS

5 Broadgate

London EC2M 2AN

Helen McDonald - Director
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W: www.ubs.com/charities-uk

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Waverton Investment Management

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John Finch
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bluQube finance software is developed by Symmetry, based in Bristol.

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Park House, Peterborough

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