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All the outstanding winners from the 2012 Charity Times Awards

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FIRST CHOICE FOR NON-PROFIT MANAGEMENT

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Excelling in testing times

ON THE day in late October when official statistics suggested the UK is coming out of recession, the NCVO released its latest *Charity Forecast Survey*, showing charities are continuing to battle with financial pressures whilst working to deliver services.

The survey showed that 89 per cent of respondents expect to increase (44 per cent) or maintain (45 per cent) the services they offer over the next quarter. Although 43 per cent predict their expenditure will decrease over the next 12 months and just 16 per cent expect it to remain static.

Not for the first time, the findings show that charities anticipate the year ahead will be tough, with 51 per cent of respondents expecting their financial situation to deteriorate over the next year.

Sixty per cent of charities said they expected to compete more with other organisations over the next year.

Sir Stuart Etherington, chief executive of NCVO, has called on the Government to support charities by encouraging the opening up of commissioning processes and by removing the complexity to initiatives such as the Gift Aid Small Donations Scheme so charities can benefit. These are fair assertions and it would be good if the Government listened and, more importantly, acted.

Association chiefs from ACEVO, NCVO, NAVCA and the Small Charities Coalition also sat before the Public Accounts Select Committee to give evidence on the Charities Act exploring the impact of cuts on the Charity Commission, the registration of charities and the definition of public benefit and rules on political campaigning. There are so many misnomers reported and offered as comment on these issues in the mainstream media that it is good that the sector can have its say in a proper informed way.

The fantastic work of so many sector organisations was celebrated at the Charity Times Awards in October (page 37).

The list of winners is truly impressive, as was the high standard and depth of each of the categories making up each shorlist, indicative of the remarkable work the sector keeps doing in the most testing of times.

Andrew Holt
Editor

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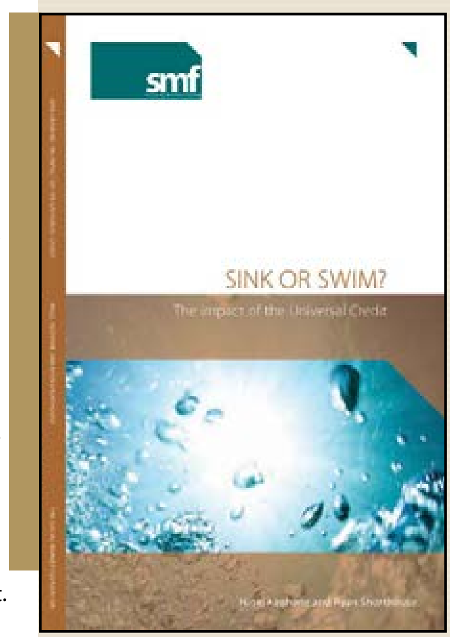
Sink or Swim? by the Social Market Foundation

There is no doubt that the introduction of Universal Credit from October 2013 onwards signals the most significant change to the benefits system since Beveridge. The main aims of the reform are to simplify the system through integrating six core benefits into one single payment and to effect behaviour change through 'nudging' households to take responsibility for budgetting their money. *Sink or Swim* is based on research which assesses six key aspects of the reforms which will have the potential to have a significant impact on the ability of households to manage their money more effectively. These include: the integration of six core benefits and tax credits into a single payment; a shift to monthly payments; a new fixed' monthly assessment system replacing the annual 'flexible' assessment period for tax credits; payment of housing benefit to social tenants than direct to the landlord; payments to a single recipient in a household; and the extension of the capital allowance rule, which currently applies to those on out-of-work benefits, to all Universal Credit recipients.

In assessing the impact of each of these reforms the research focuses on answering three questions: how are low income families copying with the current financial squeeze and managing their finances? What are the likely implications of the Universal Credit payment reforms on household budgeting and financial resilience? How can we design Universal Credit to promote personal responsibility and help low income households build their financial resilience?

The research, based on 30 original in depth interviews and three focus groups with low income families, provides a robust insight into the financial pressures on low income households. The research findings very much echo Barnardo's concerns that many low income families are struggling to manage their finances and are getting trapped in a cycle of debt. The research is set within the broader context of the introduction of Universal Credit from autumn 2013 following five years of economic stagnation. Many households had few savings and were ill prepared to cope with the current economic challenges and many are already indebted. The families interviewed give examples of how they struggle to get by through 'sophisticated budgeting methods' and drawing on a range of financial support from family and friends to borrowing from banks. The research concludes that many aspects of Universal Credit will prove difficult for families such as the move to monthly payment and the payment of Housing Benefit directly to tenants. There was however general support for a single payment believing this would make the process for claiming benefits simpler, and for fixed monthly assessments although having to wait a month before payment risks exacerbating debt problems. The report proposes a 'Budgeting Portal' that would sit alongside the normal claims process for Universal Credit. Recipients could choose to opt into the Portal which would allow them to make changes to the way their benefit money was transferred before it went into their bank account. The Portal would not hold money but would allow individuals to decide how payments could be structured. So for example, it would be possible to divide payments for different purposes such as childcare; different household members or diverting cash into savings.

NEERA SHARMA ADMIRES A REPORT WHICH PROVIDES A VALUABLE INSIGHT INTO THE CURRENT FINANCIAL SITUATION THAT LOW INCOME FAMILIES FACE



The use of the Portal would encourage people to take responsibility for managing their finances and to build resilience by planning for future unexpected or lumpy expenditure. The idea behind the 'Portal' is an interesting one. However, the report could have benefited from some of the families in the research trialling this over a period of time. The lack of any assessment of how much this could cost and who would deliver it is a gap. A key aspect of Universal Credit is the assumption of 'digital by default'. The research with families did not explore whether they all have the access to IT and the skills to manage their money on line in such a way.

This report provides a valuable insight into the current financial situation that low income families are currently in and their resilience to cope with Universal Credit. However, where it falls short is a thorough exploration of how the proposed 'Portal' could be delivered and how low income families would have the financial and IT capabilities to use it.

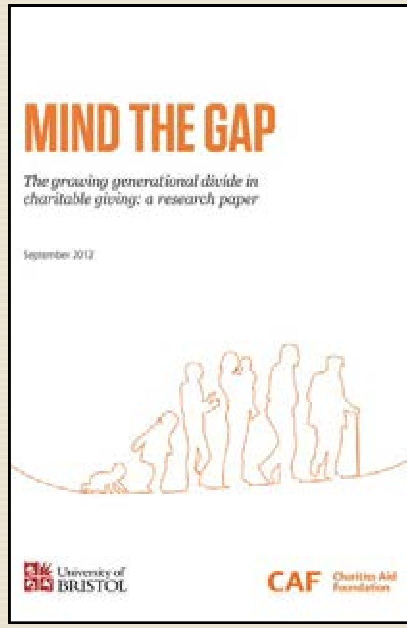
Neera Sharma is assistant director of policy and research at Barnardo's

Sink or Swin is available from: www.smf.co.uk

Mind the Gap by the Charities Aid Foundation

The recent CAF report *Mind the Gap* has caused quite a stir in the charity sector and given rise to a wide range of opinions, most of them fairly critical. The report doesn't really tell us a great deal that we didn't know already – the fact that charities face an uncertain future, the fact that the economic crisis has hit many charities hard and the fact that charities are facing the double whammy of seeing an increased demand for their services while at the same time having their funding cut – these are all things that we have known about for some time.

LOUISE RICHARDS OVERALL COMMENDS A REPORT THAT POINTS OUT THE WIDENING GAP IN GIVING HABITS BETWEEN THOSE OVER 60 AND THE YOUNGER GENERATION



The essence of the report is to point out the widening gap in giving habits between those over 60 (the 'baby boomers') and the younger generation. Is this so surprising given the fact that youth unemployment is at record highs and that the number of 'neets' is growing daily? Figures produced at the end of June this year showed that one in six 16-to-24 year olds in England were not in education, employment or training, with a small rise in 16-to-18 year old Neets. The report tells us that older households give more than younger households – again, is this so surprising given that so many under 30s are unable to get a foot on the housing ladder, and even if they do, they may face years of paying back tuition fees to the Government? And at a time when the Government is proposing yet more cuts, it is inevitable that a majority of households will be facing a decline in their disposable income. In many cases, the report fails to point out the underlying causes of why people give when they do. It says that people are more likely to give as they get older, until they hit their 50s, when their giving starts to decline, but provides no evidence as to why this is. The fact that people in their 50s may have children of university age or are still paying off their mortgage are surely factors that influence giving at this time of one's life.

The report paints a gloomy picture of the future, predicting a donation deficit when people of the older generation pass away. Yet it falls short of putting forward strategies to address this problem and the solutions it does present – reforms to Gift Aid and Payroll Giving and the introduction of Lifetime Legacies – will not necessarily lead to generation Y giving more and do not address core issues such as why younger people appear to be giving less and how they can be inspired to give more.

The importance of introducing children to charities at school is quite rightly highlighted in the report, but it ignores the work already being done by the Citizenship Foundation and Giving Nation, a national initiative which supports young people to give both time and money. Over the last four years, 163,000 people in over 3,700 classes have directly run Giving Nation projects. Through these initiatives, £780,000 has been raised for good causes and 940,000 volunteer hours have been completed, with the average student donating 5.8 hours of their time on projects.

Although the importance of engaging younger people in giving should not be underestimated, it is equally important to continue to harness the generosity of the over 60s. People are living longer, and the rush to engage younger people through the adoption of online techniques should not lead to a situation where the older generation are forgotten.

The benefit to charities of leaving a charitable gift in one's will is not mentioned in the report, although legacies continue to provide many charities with a vital lifeline. At the same time, younger people are more likely to engage with charities online; this means that charities must innovate and make the maximum possible use of social and digital media.

The report has at the very least ensured that the importance of giving remains high on the agenda. But whilst there is an imperative to take steps to further engage the younger generation, charities need to inspire people of all ages to give.

Louise Richards is former director of Policy and Campaigns at the IoF and is writing in a personal capacity

Mind the Gap is available at: www.cafonline.org

Open Access by the CBI

CHARLOTTE STUFFINS NOTES THIS REPORT IS BASED ON COST SAVINGS, AND ARGUES THAT WHILST THIS IS IMPORTANT IN THESE AUSTERE TIMES, THE QUALITY AND OUTCOMES OF SERVICES TO MEET USERS NEED MUST ALWAYS BE PARAMOUNT

Open Access, the recent report from the Confederation of British Industry (CBI),has called for the Government to go further and faster in opening up public service markets to competition from private companies, social enterprises and charities. NCVO believes that many charities are well-placed to improve both the design and delivery of public services. Yet we are still concerned by the scarcity of opportunities for charities to be involved in public service delivery, which this report does not fully capture.

Often charities provide services because it is a way to directly support their beneficiaries. Yet the many charities are now operating in an uncertain economic environment, compounded by decline in statutory funding. This means that, more than ever, public service provision is a vital source of income for many organisations- With charities having such a high stake in the public services market, NCVO agrees with the CBI that the Government needs to express a clearer vision for how public services markets will operate in the future. The Government needs to clearly communicate the likely future of the market, so that undue risks are not passed onto the already squeezed charity sector.

Risks like those felt by charity sub-contractors in the Work Programme. NCVO's recent report found that half (47%) of respondents to our survey felt that their contracts were at risk of failure within the next six months and a quarter (26%) thought they were at risk of failure before the end of the contract. The same Work Programme held up in the CBI's report as a model for public service delivery. Whilst there is some good practice and some positive outcomes emerging from the scheme, the experiences of many charities are mixed. NCVO would discourage the celebration of this new model before the full impact has been evaluated.

In particular, many charities have reported difficulties with the payment structures used in the Work Programme. Services in this model are paid on a Payment-by-Results (PbR) basis, which is when an organisation is paid after the proven impact of services is demonstrated. This can improve accountability and efficiency of service provision but is a seismic shift from the traditional contract payment methods to which many charities are accustomed. Government and local authorities need to do much more to support charities to reduce the barrier that this payment structure creates. More worrying still, there are many charities who are taking on a large amount of risk under the Work Programme, putting their organisations' future wellbeing at risk. And there is also evidence that the huge size of contracts is excluding smaller, more specialist charities from the Work Programme. Nonetheless, the CBI's report does focus on a number of other aspects of the Government's Open Public Service agenda. For example, we echo the report's call for commissioners to measure outcomes in public services. We also agree that work is required to ensure continuity of services in any change-overs of providers, or when things go wrong. This is especially important for services supporting vulnerable people, who will often be dependent on a particular service. Other findings in the report that did not make the headlines were around increasing transparency in commissioning processes and ensuring effective engagement with all providers during the design stage of contracts. NCVO strongly echoes both of these recommendations. Lastly, there are many benefits to opening up public services to a wide range of providers, which are not purely focused on saving money. Many of NCVO's members are providing tailored, innovative services to seldom-heard service users or vulnerable people. Yet these providers may not always be the cheapest option.

It is vital that commissioning processes allow for the social value of services to shine through and for contracts to be awarded on an outcomes-focused basis, not simply to the lowest offer, which is likely to come from the private sector. The main thrust of the CBI's report is based on cost savings and whilst this is important in these austere times, the quality and outcomes of services to meet users' need must always be paramount.

Charlotte Stuffins is in the policy and research team at NCVO

Open Access is available here: www.cbi.org.uk

The Regional Growth Fund Fifth Report

This Report, published together with formal minutes, oral and written evidence, running to 60 pages, was published on September 4, and is required reading for all concerned with government support for regional development and the intricacies of getting the job done.

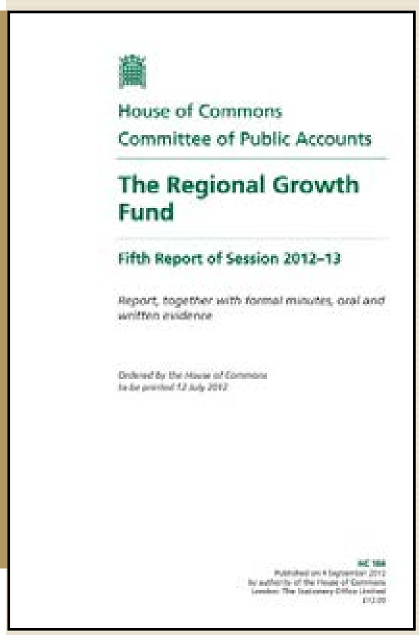
The report reminds that the Government established the Regional Growth Fund in June 2010 to support projects with the potential to deliver economic growth and additional, sustainable private-sector jobs, particularly in areas that rely more on the public sector for employment. £1.4bn was allocated for competing projects, with a further £1bn available for future rounds.

So far so good, but the report reveals that "The Committee was highly disappointed to find that so few final approvals had been given and so few projects had actually started", with Margaret Hodge stating: "It is nothing short of scandalous that so few projects funded by the Regional Growth Fund have actually got off the ground". The Committee noted that of the £1.4bn, only £470m had been paid out by Government, £364m has been parked with intermediary bodies via endowments and a further £57m paid to other intermediaries, with only £60m reaching front-line projects. As a result only 5,200 jobs could be claimed as having been created or safeguarded in projects where the offer of funding has been finalised, against targets of 36,800 over the lifetime of these projects.

With a series of observations and conclusions, the Report focuses in on delays, and the need for sufficient staff and clear targets to facilitate speedy processing, the use of intermediaries and funding in advance. On these matters, issues identified include the need to clarify management arrangements and assurance that management charges are kept to a minimum, and resources are allocated to projects consistent with good stewardship, with Treasury definition as to when endowments can be used, with reporting to Parliament to ensure transparency.

As for determination of benefits secured, there was plenty of confusion as to what had been achieved in job creation, with the pointer was that the Department for Communities and Local Government (DCLG) and the Department for Business Innovation and Skills (DBIS) should report publicly on the amount of money spent and the number of jobs actually created and/or safeguarded by businesses in receipt of funds. There was also the view that the acceptable value for money criterion for awarding funding that economic benefits should outweigh the public cost, was too modest, and that In future, the bar should be higher, with disclosure where appraisals suggest poor or marginal value for money for the taxpayer. There was also criticism for the DCLG and the DBIS for not having a clear plan for evaluating the Fund's impact.

JAMES BEVAN SAYS THIS REPORT CAN BE READ AS GLOOMY, BUT IT ALSO RECOGNISES THAT DELAYS IN PAYING FUNDS OUT CAN OCCUR FOR SOUND COMMERCIAL AND PRACTICAL REASONS, AND THAT THE TARGETS WERE AT LEAST AMBITIOUS


House of Commons
Committee of Public Accounts

The Regional Growth Fund

Fifth Report of Session 2012–13

Report, together with formal minutes, oral and written evidence

The Report can be read as gloomy, but it also recognises that delays in paying funds out can occur for sound commercial and practical reasons, and that the targets were at least ambitious. As for the metrics for determining success, much positive impact cannot be measured in terms of jobs, or indeed narrow definitions of 'value for money', and we can rejoice that some projects were explicitly chosen for reasons other than value for money, such as location, deliverability or assumptions about wider benefits, which are less easy to quantify. This only strengthens the call for real world information on what is intended and has been achieved, so that impacts can be measured appropriately.

At the heart of the challenge are the ongoing questions as to who's best placed to make the right decisions on which localities should receive funding and for what, how competing claims should be assessed, how outcomes are best measured, how such funding should be co-ordinated with other initiatives such as the Growing Places Fund, and how programmes should be delivered. Looking forward, although it is part of the criticism within the Report, the reader and future beneficiaries of works undertaken may decide that the DCLG and DBIS can be commended for agreeing with the Treasury that some of the intermediated programmes could be funded via endowments to be drawn down over several years, rather than losing funding due to Treasury clawback policies.

James Bevan is CIO at CCLA Investment Management

The report is available here: www.parliament.uk/business/committees/

Recapturing the Reluctant Radical by C Fieschi et al

Like many people of my generation who studied history at school or university, a good whack of my education was devoted to learning about fascists of one sort or another. So reading Recapturing the Reluctant Radical: how to win back Europe's populist vote was in one way a slightly depressing reminder that the far right in Europe continues to provide social scientists with work to do.

But it is also an interesting analysis of what the authors call 'soft, uncommitted' supporters of the far right – those who are most amenable to being brought back into the political mainstream. Using surveys and national election studies from across Europe, the research finds that these 'reluctant radicals' often form at least half of right-wing populist voters. But it also challenges what the report calls a "common assumption… that right-wing populism is the preserve of disadvantaged young men," and a "typical profile of a right-wing populist party supporter… young, often violent, poverty-stricken and male". Whilst these assumptions might hold true to a degree for the 'hard core' of far right voters, the report finds that in whilst men are more likely to be 'reluctant radicals' than women in some countries (including for UKIP and the BNP), in others (such as the Netherlands and Norway) the gender gap is small. In some countries younger people are more likely to be 'reluctant radicals' than older people, but in some countries (such as Denmark) the opposite is true. Unemployment correlates to reluctant radicalism only in Germany. What the researchers find holds true across all the countries they looked at was that lower levels of education, rather than age, gender or unemployment, are the most consistent predictor of 'reluctant radicalism'.

The report also challenges the prevailing narrative of right-wing populism on the rise across Europe, stimulated largely by the recession. It argues that in fact, the far right is struggling in some countries (Italy, the UK, Denmark, Norway and Switzerland), and that many of Europe's far right parties experienced some of their greatest periods of growth in times of economic prosperity. "The evidence", the authors write, "points to a picture that is more complex than a single comparison with the 1930s might suggest".

Stereotypes challenged, what do the authors recommend if we are to win the 'reluctant radicals' back to the mainstream? First, the report argues, we need to delve beneath the surface on anti-Europeanism, anti-elitism and anti-immigration, and tackle specific factors that help feed such sentiments, rather than "pretending to be able to 'stop immigration'." Second, don't adopt a 'one-size-fits-all' approach – reluctant radicals are a diverse group, even within one national context.

RALPH MICHELL FINDS THIS REPORT ON THE FAR RIGHT IN EUROPE FASCINATING ANALYSIS – BUT DON'T EXPECT IT TO GIVE YOU ALL THE ANSWERS ON A COMPLEX SUBJECT

Third, drop the over-emphasis in policy responses on young, disadvantaged men. Fourth, invest in education (given that there is a clear correlation between low levels of education and reluctant radicalism). Fifth, focus more on women. Sixth, 'have the difficult conversations' on issues like immigration, rather than hiding away from them. Seventh, invest in infrastructure and services, reducing the sense of isolation or being left behind that fuels much reluctant radicalism (for instance in rural France). Finally, engage with Europe by "making a renewed case for the importance of an accountable and transparent European Union." The report is an interesting read. My only criticism would be that it left me wanting analysis more clearly focused on one national context, or one far-right party. The report covers such a range of far-right parties, in such a range of political, economic and cultural environments, that it becomes hard to draw too many conclusions, say, for what anyone worried about the EDL in Britain could do about it.

It analyses the uncommitted supporters of UKIP in the same vein as those of downright fascist groups like the Hungarian Jobbik party (while I'm not a fan of Nigel Farrage and co, they do at least refrain from creating uniformed vigilante groups to tackle 'gypsy crime'). The result of having such a broad canvas is that some of the conclusions are perhaps necessarily vague (for example, the recommendation to 'have difficult conversations'). The report is an interesting analysis – but don't expect it to give you all the answers.

Ralph Michell is director of policy at ACEVO

The paper is available at: http://counterpoint.uk.com

The Data Dialogue by Jamie Bartlett

Websites are no longer simply shop-windows for services and products. They are now one-way mirrors, providing organisations with rich data on the people passing through. Some of this data is surrendered consciously via feedback forms or when a transaction is made. However, many, many more are collected surreptitiously, in website 'log files' or through the more sophisticated 'cookie' method (a piece of code that tracks visitors' 'behavioural' activity).

Not everyone cares how their personal data are used. Some are vehemently opposed to the storage of any personal information on remote machines by remote organisations unless there is a legal imperative for doing so. Others regard the surrender, storage and exploitation of their personal and behavioural data as a scourge of the digital age and a matter over which they have no control. Yet others view it as a trade-off: they are willing to share certain personal data in exchange for something of value (cash/information/services). Other people just don't care or just don't understand what's going on and feel powerless to do anything about it anyway. In the voluntary sector, however, we do have to care. While the digital age has made it easier than ever to collect, store and make most effective use of personal data about donors and service users, with this new ability comes greater responsibility to use it with respect to both the law and the wishes of the person whom the data are about.

In 'The Data Dialogue' (based on research by polling company Populous commissioned by telecoms giant O2), Jamie Bartlett of political think-tank DEMOS considers what this unprecedented level of information sharing means for organisations concerned with service delivery. Described as 'the most in-depth research to date' on publicattitudes towards information-sharing, it is front-loaded with insights into how the public feel about data-sharing. Although the third sector is not mentioned, clearly voluntary organisations grapple with the same issues as corporates when dealing with 'Big Data'. DEMOS finds that the public has become 'fearful' of sharing personal data because of failures on the part of organisations to clearly explain how they will use it and suggests this may be resolved via 'open and honest' conversations with customers. While this throws out a challenge to all sectors one wonders what lessons other industries might learn from the third sector's experience and expertise in managing personal data. After all, voluntary sector donor developers were at the forefront of personal data management long before the world-wide web made data collection easier for the corporate world.

JULIE HOWELL SAYS THIS REPORT HOLDS FEW REVELATIONS FOR SENIOR VOLUNTARY SECTOR MANAGERS FOR WHOM ACCOUNTABILITY FOR HOW DATA ARE GATHERED, STORED AND USED HAS LONG BEEN ON THE AGENDA

DEMOS finds 'no single attitude' to sharing personal information and suggests five separate categories of public opinion on data-sharing - non-sharers, sceptics, pragmatists, value hunters and enthusiastic sharers - the greatest of these being the 'non-sharers' at 30% of 5,000 people surveyed. These 'non-sharers' are knowledgeable about data protection and take measures to protect their personal data. At the other end of the spectrum, only 8% are found to be 'enthusiastic sharers', amenable to sharing more in the future, but with concerns about the ways their data might be 'misused'.

DEMOS concludes there is a 'crisis of confidence' in information sharing and suggests that regulators and companies need to respond in a 'dynamic and flexible' way that reflects the diversity of views held by the public. Organisations must give individuals more control over what, when and how they share information, while acknowledging that attitudes towards privacy change. If organisations fail to adapt, public confidence in the perceived benefits and security of data-sharing may decrease, with detrimental consequences for individuals, organisations and the economy. This report will hold few revelations for senior voluntary sector managers for whom accountability for how data are gathered, stored and used has long been on the agenda and while the report draws a number of conclusions it makes no recommendations. However, it does reveal the myriad opinions on data sharing and in this regard alone adds to our understanding of how the public feel about data-sharing in a digital age.

Julie Howell is with Julie Howell PR

The paper is available at: www.demos.co.uk

After the party

THREE WEEKS, THREE CITIES, THREE CONFERENCES, PLENTY OF NATIONAL MEDIA INTEREST. BUT WHAT CAME OUT OF PARTY CONFERENCE SEASON THAT WAS RELEVANT FOR CHARITIES? BECKY SLACK REPORTS

"You know, I've spent three years trying to explain the Big Society. They did it beautifully in just three weeks." With the exception of this one mention of the Big Society, made by David Cameron in his closing speech at the Conservative Party Conference in relation to the work of the Olympic Games Makers, the role of volunteers and civil society received little attention throughout this year's party conference season – a stark contrast to 2010 when Big Society was mentioned as many as ten times in the Prime Minister's speech alone.

This cooling of attitudes towards charities did not go unmissed by those from within the sector who were participating in conference season. "Coalition politicians don't want to hear the term 'Big Society', even if it's just in a whisper", remarked Jane Tully, head of policy and public affairs at the Charity Finance Group. Fiona McEvoy, campaigns manager at CAF, concurred: "It would have been easy to feel as though charities have been somewhat de-prioritised."

Instead the primary topic for discussion on the main conference floor at all three events was, understandably, the state of the country's coffers. And while there was little discussion of the specific role charities had to play within this, there was lots of debate about the issues the sector works to resolve.

"Clearly the major focus was the economy, which will dominate for the next three years," said Roger Harding, head of policy and public affairs at Shelter. "However, politicians are starting to realise this is not just about whether people have got a job; and it was interesting to see there was also debate around living costs – not so much about money coming in but going out," noted Harding, highlighting how there was particular emphasis on the cost of fuel, energy, child care, social care and housing.

In part, this can be attributed to Ed Miliband's recent emphasis on 'predistribution', the idea that the way to a more equal society is "higher skills, with higher wages, an economy that works for working people." More attention was given to this theory within his speech to Labour party members, along with the introduction of (yet another) buzz phrase – One Nation.

Looking to the sector

Yet despite Miliband's vision of a Britain where "dedication to the common cause courses through the veins of all", which some would say sums up perfectly the fighting spirit of the voluntary sector, again the role charities have to play received little attention.

However, NCVO's parliamentary and media manager Chloe Stables reckoned this doesn't necessarily mean they have been forgotten. "Politicians of all stripes are looking to the sector to improve impact and are saying 'we value your skills and reach into communities'", she said. "But equally, there is no language around the sector being a special case. We're in the era where we are expected to compete with everyone else."

Instead, as Stables hinted at with the use of the word 'impact', attention has turned to performance measurement, both on the part of government looking to the sector for proof that it can deliver, and on the part of the sector which is keen to show ministers the impact of policy, particularly in relation to welfare reform.

This was evidenced out on the conference fringes, where a packed programme of events offered delegates a plethora of opportunities to hear from organisations keen to highlight their role within, and perspectives on, public life.

One such event was hosted by the Salvation Army and attempted to shine a somewhat more positive light on the Work Programme than it had previously received. "We have the working capital available and we think it's a good investment to use donors' money to get people into work," said Helen Robinson, director of Salvation Army Employment Services, which is a Work Programme sub-contractor to Pertemps.

Track record

For those charities struggling to shoulder the financial risks that the Work Programme and other Payment by Results contracts offers it was suggested impact measurement might hold the key to future financing, with Lord Freud, the Parliamentary under Secretary of State for Welfare Reform, highlighting that "some sub-contractors are building credibility to finance their own operations."

"Once you have a track record, the challenge of raising finance will be reduced. One of the great problems of the first round was that no one had a track record so it was harder to find funding," he said, pointing delegates towards social impact bonds. Indeed, this was a message that was also reiterated at a separate Conservative Party fringe event, hosted by the Social Investment Business and New Statesman, which looked at the potential of social investment.

"Our existence will make that type of funding [Social Impact Bonds] easier to access, making it easier for the social sector to play a bigger role in Payment by Results," said Nick O'Donohoe, chief executive of Big Society Capital, the social investment wholesale bank.

He added that while previously there were very few places for charities to go to for social investment, over the forthcoming period more schemes are to be announced. "This is a profound change," he said. "If you have an idea that needs to be financed, whereas before you had just two calls to make, now you will have seven or eight calls to make."

The Minister for Civil Society, Nick Hurd, agreed with O'Donohoe, emphasising how trusts and foundations also have a key role to play in financing the sector.

"Foundation trusts on their own currently invest around £100bn in assets through traditional financial institutions and products, let alone pension funds. If we could persuade them to allocate a tiny percentage of their endowments to help support long term affordable finance it will help get us away from the tradition of hand-to-mouth funding," he said.

While the layperson could be forgiven for thinking this all sounded very positive, ACEVO's Stephen Bubb, who was also participating in the Social Investment Business panel, threw a note of caution into the debate.

"I worry about impact investing. It is right that our organisations should be looking at impact and measuring, but there is a danger that, just as grants became burdened with conditions, impact bonds will be straightjacketed into achieving particular outcomes. We should be supporting our sector to grow rather than telling them 'this is what you have to achieve or you won't get support'," he said.

Social Value

Meanwhile, the NAVCA/Respublica fringe event at the Labour conference served as a reminder that even when the Government has embraced charities (and has gone as far as changing the law in their favour), this doesn't mean the sector can rest on its laurels.

The event in question highlighted how more work needs to be done to encourage use of the Public Services (Social Value) Act by procurement professionals. The Act, which became law in March of this year, places a duty on public bodies to consider economic, social and environmental social value ahead of any procurement activity.

However, the panellists raised fears that local authorities would fail to do this. Gareth Thomas MP, shadow minister for civil society, emphasised how the Act had not even made it onto the Commissioning Academy's programme, while Hazel Blears MP, the vice-chair of the All Party Parliamentary Group for Social Enterprise, described the wording as "weak" and called upon the sector to champion its use. "We should all push this as hard as we can, she said. "If we can get co-ordinated on this we could see incredible change."

Blears was also not the only individual to issue a call to action. Elsewhere, Kate Green MP and shadow minister for equalities used a Demos/Cadbury Barrow Trust debate to say that it was time more charities spoke about the impact of austerity measures on women: "It is the case that voluntary organisations are fearful. They are reluctant to speak out," she said, while discussing how both the position of women and the organisations that support them have been "very significantly weakened" by the impact of austerity.

Meanwhile, the Shadow Minister for International Development, Rushanara Ali MP made a similar request during an Islamic Relief/New Statesman fringe, calling on NGOs to "collectively pressure government" into playing a leadership role within the humanitarian and development communities.

Overall, the conferences highlighted how critical it is for the sector to have a loud and unified voice, said ACEVO's Bubb. Speaking with Charity Times after the conferences, he said: "Over the next two years, the parties will be putting together their manifestos and government will be thinking about public spending rounds from 2015 onwards. This is a hugely important time for the sector and if we don't get our messages across we're in real trouble."

Becky Slack is a freelance journalist

BIG IDEAS

Big Society may have dropped off the radar, but elsewhere there was lots going on for charities to take notice of…

On predistribution:

"This could potentially mean a lot for the charity sector. One example would be to focus on increasing wages rather than allowing ourselves to be stuck permanently being a low-wage economy. We will want to harness the sector's vast array of expertise, skills and experience to work through and implement such ideas."

Gareth Thomas MP, Shadow Minister for Civil Society

On government policy

There was a distinct lack of will to set out clear policies that may give an indication of where funding cuts might fall. For charities, particularly those working on welfare, housing, employment and other social issues that are heavily dependent on state funding or who deliver services to vulnerable beneficiaries, the failure to provide more certainty complicates their planning for the next couple of years.

Jane Tully, head of policy and public affairs at the Charity Finance Group

On attitudes to welfare:

"An event looking at the British Social Attitudes Survey by the National Centre for Social Research highlighted hardening attitudes to welfare provision that have the potential to impact upon the work of charities."

Roger Harding, head of policy and public affairs, Shelter

On engaging young people:

"It is vital charities do more to engage with young people through apprenticeships, internships and recruiting younger trustees, and for organisations to come into line with the digital age."

Baroness Tyler, chief executive of Relate

A sector united

The Third Sector

STEPHEN BUBB **argues that whatever their size, charities are united by their mission, to the beneficiaries and causes that they serve and in these challenging times, the sector must remain united behind shared priorities and goals**

These are tough times for the voluntary sector. Our role has never been more important, yet the resources we have available are being squeezed. We face the enormous challenge of delivering vital services to citizens and communities at a time when an anaemic economy and public spending cuts are set to remain part of the political landscape for the foreseeable future. The sector faces its toughest challenge for a generation, which is why it is so important for it to remain united. Unfortunately, in many ways the sector has become increasingly divided into two crude categories of 'big' and 'small' charities. The big charities are stereo-typed as corporate, predatory and ruthless, a sort of third sector equivalent of Kraft Foods, while small charities are caricatured as incompetent, unsophisticated and rather peculiar, like the 'local' village shop in the League of Gentlemen.

Much of this lazy stereotyping comes from outside the sector, but some of it comes from within as well. I believe it's more important than ever that we challenge these preconceptions and make it clear that large and small charities alike are platoons in the same army. Diversity and plurality has always been not only a feature of the voluntary sector but a key strength, part of what drives the sector's capacity for innovation and its ability to forge close links with different communities. However, charities still have much more in common with each other than with other sectors. Whatever their size, charities are united by their commitment to their mission: to the beneficiaries and causes that they serve. In these challenging times, we as a sector must remain united behind our shared priorities and goals.

In part, that means refocusing on the benefits of collaboration and partnership within the sector. It strikes me that while we as a sector are often quick to criticise the private sector for aggressive competition, we are less eager to recognise the value of partnership between our own organisations. Although the financial climate has led to renewed interest in mergers, there is less focus on how voluntary organisations can complement each other's strengths through partnership working, or find collaborative approaches to addressing shared problems. In fact, the voluntary sector frequently resorts to internal squabbling in adversity. Too often we hear the relationship between larger and smaller charities being portrayed as adversarial, with mutterings about unfair advantage, and complaints about national organisations 'riding roughshod' over their local counterparts.

There will always be controversy connected with commissioning, especially given the highly variable standard of public sector decision-making in this area. However, as a sector we must always put the interests of our beneficiaries first. In my view that means working towards a more productive relationship between different types of voluntary organisations, be they big or small, local or national. We should take inspiration from the existing examples of effective partnership working between charities of different sizes and types, such as the Dementia Action Alliance led by Alzheimer's UK, or the work led by the RNIB to develop a strategy in partnership with organisations across the sector. Scale can be a great asset, but local knowledge and community roots are a special prize that commissioners smother at their peril. The most effective partnerships bring both qualities together behind a common goal.

This is why ACEVO is working hard to support partnership working between large and small organisations in our sector. We are working to ensure that national policies on commissioning recognise the particular nature of our sector, support effective partnerships and understand the value that local and community-based organisations bring to delivery. For instance, ACEVO proposed and developed with DWP the code of conduct that governs welfare-to-work subcontracting, and then the Merlin Standard to give it some teeth. We need to continue strengthening these measures, and to ensure they are consistently applied. I recognise that there are some difficult issues to work out, but I feel certain that the decade ahead requires us to bury the Kraft and League of Gentlemen stereotypes, and collaborate more. The diversity of our sector is one of its greatest strengths, and we must not let it become a weakness. It's time to refocus on what unites us, and work together in the interests of the causes and beneficiaries we serve.

Sir Stephen Bubb is chief executive of ACEVO

Charity finances

Banking Reform

The Government has recently published its draft Financial Services (Banking Reform) Bill, laying out legislative plans to reform the banking system to enhance stability and competition. The Bill, which is currently with the Commission on Banking Standards for pre-legislative scrutiny, is a key element of wider efforts to de-toxify the banks and engender confidence in what many view as a broken system.

As the financial crisis broke and the need for reforms became apparent, what also came to light was that the protections in place for bank customers were inadequate and largely inappropriate for charities. In the aftermath of the collapse of the Icelandic banks in particular, the chasm between charities' exposure to risk and ability to manage it, and their level of protection was widely acknowledged.

It was therefore hoped that the overhaul of the banking system would also be used as an opportunity to address these issues that have been lingering since the crisis. Unfortunately, in the context of their effect on the sector the reforms have been regressive, pushing up levels of risk. The increased risk is the result of depositor preference, one of the key elements of the draft Bill. At present, when a bank fails, depositor claims are ranked equally and each stand to recover the same proportion of their deposits. With depositor preference, 'insured deposits', those eligible for FSCS protection, are made preferred debts and prioritised over the claims of others – the rationale being the FSCS can then recover more and the taxpayer won't have to subsidise the scheme. The result, however, is that charities are pushed down the creditor hierarchy, significantly reducing the amount they stand to recover if their bank collapses.

In reality it is rare for a bank to fail, yet the consequences of losing deposits – the negative impact on cash flow, ability to operate and ultimately, beneficiaries – are such that it is only sensible to mitigate the additional risk. And doing so comes at a cost. Charities may migrate to 'safer' banks, which typically pay lower deposit rates. Others may choose to increase their use of costly professional advice. While we would always support organisation's efforts to upskill, investing in training for staff so they are better equipped to manage banking risk is an expensive undertaking – particularly if it's for the sole purpose of simply maintaining the current levels of risk.

MELORA JEZIERSKA **says it was hoped that the overhaul of the banking system would also be used as an opportunity to address the issues that have been lingering since the financial crisis, but the context of their effect on the sector are regressive**

The Government hasn't deliberately set out to make things worse for charities and in fact, looking at the wider picture, everyone will benefit from a more stable and reliable banking sector. However, one of the principles underpinning the reforms and the FSCS is that the cost of bank failures should be borne by those best able to manage risk and absorb losses. And in our mind, subjugating the claims of charities when a bank collapses undermines this principle.

Charities are not as well positioned to monitor markets and manage complex banking risk as other creditors, particularly commercial organisations, of a similar size. This is certainly not to suggest charities are incapable of taking on the responsibility or can't manage their finances as well as their private sector counterparts, but it comes down to what a charity is there to do: serve beneficiaries rather than make profit. Monitoring banking risk is a timely and costly job, and it's difficult to justify using charitable funds for this purpose.

In terms of being best able to absorb losses – again this is wrong in the charity context. Charities typically hold large amounts on deposit, as they require quick and easy access to cash to ensure commitments are met and services delivered. For the largest charities, we're talking tens or hundreds of millions. A total of around £18bn across the sector. Charities stand to lose a lot more, relative to their size, than other creditors who generally have a smaller proportion of their income in the bank, and a much more fluid cash flow. This money is for public benefit and in many charities' cases no others can easily take on services they provide if losses mean they can't afford to continue. There are also other factors to consider, such as impact of any losses on public trust and confidence. Our proposed solution, which we raised to Government, was to also grant charities preferred creditor status, so their claims would rank equally with the FSCS. Unfortunately, after review and evaluation, this proposal was rejected which means it's back to the drawing board. The Government shouldn't ignore the effects a bank failure can have on charities and, most importantly, those they serve.

Melora Jezierska is policy and public affairs officer at Charity Finance Group

The Big Society

Civil Society challenges

JOE IRVIN, **argues that The Big Society concept deserves a proper response from the Labour Party through a viable alternative, in what should be natural Labour territory, as it is not enough to just dismiss it**

It's often annoying when politicians tell us that we live in a broken society. Of course there are problems and there are too many tragedies that could be avoided. But this does not mean that it is all hopeless and we are all going to hell in a handcart.

In fact we have a very strong sense of community in this country. A quarter of all adults (equivalent to 13 million people) volunteer on a monthly basis and nearly 60% regularly give to charity. CAF's World Giving Index, a league table of countries based on volunteering, giving money and helping strangers, puts the UK in the top 5.

This tells me two things: yes there are plenty of problems in society, but there are also plenty of people willing to join hands to tackle them. And when tragedies do occur that make you question our cohesion, you only have to look at how people react to see that our society is not hopelessly broken.

Witness the hundreds of local people who volunteered their time to search for the missing April Jones in Wales. And the thousands who lined the streets to pay their respects to the policewomen shot in Greater Manchester.

And millions of people are quietly working to help others, combat injustice, respect the environment, and bring their communities closer together.

This is why I believe the Big Society idea struck a chord with the public. However, it got into trouble when people thought the Government was acting hypocritically. The Big Society cannot mean abandoning people to fend for themselves. And it seemed contradictory to summon up philanthropy but then to limit the tax relief for charitable giving. The challenge for the Coalition is to revitalise faith in the Big Society by putting it into practice.

Labour was quick to criticise the Big Society. However, instead of simply dismissing the Big Society idea, Labour needs to create an alternative vision. For those of us involved in supporting voluntary and community action, we need all political parties to understand and support our work.

The Big Society seemed to put Labour on the back foot- occupying territory that they thought their own but I believe there is a good opportunity for Labour to come up with coherent policies in this area. Ed Miliband has recently been espousing the idea of Predistribution - taking actions that achieve greater fairness before tax and benefits kick in. Predistribution could be the key to rejuvenating Labour's thinking about how to support voluntary and community action. There are three major links between Predistribution and the voluntary sector.

The first is that Predistribution is linked to early intervention, the idea that taking early action prevents costly later intervention to support individuals or families. Preventative action to tackle inequality is key to Predistribution. Much of what charities and community groups do is about addressing inequality and reducing its impact at an early stage.

Secondly, Predistribution requires campaigning to prevent the abuse of power by vested interests. Voluntary organisations play a role in getting companies and institutions to act in the public interest. This can be through forceful campaigning against injustice, such as the Make Poverty History campaign, or through behavioural change campaigns such as the community-led Living Wage campaign.

Thirdly, Predistribution requires a strong civil society. Community action can be a bulwark against big power and help get communities organised. Part of this is creating alternative ideas and having a different vision for society. Voluntary organisations can build bridges in society, bringing people together and allowing them to develop the power needed to construct an alternative.

This is a crucial area for Labour to address. We all recognise the importance of infrastructure to get the economy working. But we also need 'social infrastructure': the people, relationships, places, networks, and voluntary groups who make our communities tick. These are the 'Social Assets' that need support and are crucial to strengthening communities and making society work well.

This should be natural territory for Labour, even if not exclusively, with its roots in communities, voluntary associations, common endeavour and co-operation.

Labour needs to construct a viable alternative to the Big Society - it is not enough to dismiss it.

Joe Irvin is chief executive of NAVCA

Payment by results

Social Investment

RHODRI DAVIES **says payment by results can, and should, be a positive thing for charities and social enterprises and the social investors who want to back them, but there are some significant issues that need addressing first**

The Charities Aid Foundation (CAF) recently released a report on Payment by Results (PbR), based on our experience of supporting charities with PbR contracts through our social investment arm, CAF Venturesome. PbR is an important issue to us, as highlighted in our report *Funding Good Outcomes: using social investment to support payment by results*, and currently a very hot topic for many charities and social enterprises. Payment by Results has emerged as a cornerstone of the coalition Government's approach to reforming public services, particularly in the areas of welfare - where the Work Programme is something of a flagship PbR scheme - and criminal justice, where PbR approaches have been seen as a key part of the "rehabilitation revolution." However, there have been recent signs that the course of the PbR agenda is not running that smooth. Charities are concerned about the way the Work Programme is being implemented, and the many problems caused by the prime contractor model the Government has chosen to use. These concerns were outlined in a recent NCVO report: *The Work Programme: Perceptions and Experiences of the Voluntary Sector*, based on a poll of charities involved in the Work Programme, which showed that seven out of 10 respondents believed their contracts were unsustainable.

CAF's main concern is the way that PbR is being implemented presents challenges not only for the charities delivering services, but also for the social investors that might want to finance them to do so. If the Government wants to make good on its ambition of leveraging in social investment to support the delivery of PbR contracts, it needs to address some of these challenges. We make a number of recommendations for how it can do this. A key point we make in our report is that commissioners should think in terms of risk sharing rather than risk transfer. We do not believe that it is right for PbR to be used as a way of effectively outsourcing the entire risk of funding public services. Currently many contracts are performance-dependent with finances paid upon successful contract completion which can make life difficult for many charities that cannot call on reserves or access commercial finance to cover the gap in working capital. Social investment can play a vital role, by providing finance to cover this working capital gap, but investing in PbR-linked deals is obviously much more risky if the contract payments are completely performance-dependent.

We recommend that PbR contracts should be structured so that a proportion of payments are made up front to cover core costs and a proportion are made only when (or if) agreed outcomes are delivered. This would represent a much fairer balance of risk between the commissioner and the service provider, and reduce the level of risk that social investors are being asked to take.

As well as the downside risk in PbR contracts, there is a question about the upside. The whole point of taking these risks is there should be the potential for returns: social and financial. But who sees the benefit of these returns? One concern is many PbR contracts are structured so the charity delivering them does not stand to benefit from outperforming against targets. This is wrong.

Charities delivering PbR contracts may also get organisational benefits, by strengthening their skills and capabilities in areas such as contract negotiation or performance measurement. This will have knock-on benefits for commissioners, as the pool of potential service deliverers will be increased, and will also bolster the Government's wider social investment strategy by increasing the number of "investment ready" organisations. This will obviously require input in terms of money and skills from social investors and commissioners, and this additional cost should be factored into the cost of contracts. There is a danger that the best intentions of social investors could cause unintended consequences in this area. These investors may try to "protect" charities from some of the responsibilities and challenges involved in public service delivery in order to "free them up to do what they do best", and as a result may actually prevent them from developing skills that would stand them in good stead in the future. It is vital that when social investors make PbR-linked investments they look for ways to help up-skill the organisations they work with at the same time. PbR can, and should, be a positive thing for charities and social enterprises and the social investors who want to back them, but there are some significant issues that need addressing if this is to be the case.

Rhodri Davies is policy manager at CAF

Partnerships

Collaborative working

Achieving more by working together, and gaining learning and ideas on the way, is a sound proposition when there is common cause of community benefit, argues DHARMENDRA KANANI

The current financial climate puts this into focus and perhaps places a higher premium on getting it right, especially when the impact of reductions in funding and fewer services starts to be felt across the country. Big Lottery Fund's (BIG) response to these challenging times is to think about how we use funding to enable better joining up, partnership and collaboration between the voluntary and community sector (VCS) and others to benefit the people and communities we support. Doing more with less is a challenge which applies to both funders and service providers – a more strategic partnership approach is one way of achieving this.

Commissioning as a driver for partnership and collaboration isn't the best device – partly due to competition, but often because this can create a sense of a forced marriage where the VCS is concerned. Across the country the VCS has a track record in delivery and is closer to the point of need but none of the clout to make this delivery experience fully count in commissioning.

BIG is putting this to the test. Knowing that 92% of our funding goes to the VCS means making sure that it is at the heart of the partnerships we support - in the driving seat rather than buckled in as side car passenger. All partners have a key role to play but it is the dynamism, connectedness and experience of the VCS, working in the most challenging of social policy areas, which is key.

In England we want to recognise and build on the assets in communities locally. We have learned that these assets are best realised when all partners working in an area with common cause, not commercial reality, focus on strengths and not deficits within a community. We want to harness our ability, through Lottery funding, to convene and broker partnerships for positive change. Alongside the security and confidence of longer term funding, we can help forge solutions to cross cutting problems in ways that have, until now, been beyond the reach of individual Government departments and agencies working in traditional ways.

For example, the homeless person looking for shelter, support, and drug advice is not helped by a system that tilts them from one service to another – a pinball approach to service provision with no single point of access and support but many gaps through which the person can fall and disappear.

In England we are focusing significant funding on partnerships working in areas of most challenging need where we know, by learning from others, that a targeted and focussed approach has a greater chance of making measurable improvements and impact. These investments are long term - we want to provide evidence of approaches that work, share intelligence and learning, avoid duplication of effort, and, let's be blunt, also help save money.

Let's look at what we mean:

We are investing £100m to improve the lives of people struggling with severe problems, multiple and complex needs - homelessness, reoffending, substance misuse and mental ill-health.

We have worked with the agencies that have worked in this field for years, listened to their woes, their learning and belief in what could actually change for the better if funding was available.

As a result, BIG is focusing on 15 local areas where there is a significant concentration of people with multiple needs. VCS organisations are to lead and set up partnerships and will each have to develop a vision for change in their local community, to demonstrate the benefit it brings, fill gaps in local provision, and share results and lessons on the way.

Most importantly we will place a high bar on the involvement of those communities that they intend to serve. The prize is between £4 million and £10 million of BIG funding between five to eight years.

This is one example of how funding is a decent carrot to bring people, in partnership, round the table. But it is the resulting evidence these approaches produce, showing what works, which will reinforce partnerships and bring about a shift in how services are joined up and delivered in the future. As is often stated, necessity is the mother of invention, or pragmatism, sometimes.

Dharmendra Kanani is England Director at the Big Lottery Fund

Profile: Brett Wigdortz, *chief executive, Teach First*

Educating the educators

BRETT WIGDORTZ SET-UP TEACH FIRST IN 2002 TO BREAK THE LINK BETWEEN LOW FAMILY INCOME AND POOR EDUCATIONAL ATTAINMENT, BUILDING IT INTO THE LARGEST GRADUATE RECRUITER IN THE UK. BUT FOR ALL HIS SUCCESS, INCLUDING RECENTLY WINNING THE 2012 CHARITY TIMES AWARDS CHARITY PRINCIPAL OF THE YEAR, HE REVEALS TO ANDREW HOLT, HE HAS ONLY JUST STARTED

The 2012 Charity Times Awards Charity Principal of the Year, Brett Wigdortz, chief executive and founder of Teach First proved a very popular choice. The judges described him as: "An inspiring, fantastic leader who has driven the organisation from the top." The journey Wigdortz has undertaken to get here has been significant and education minister Michael Gove could well take note.

He established Teach First in 2002 to break the link between low family income and poor educational attainment, and do this by recruiting and training talented individuals to be teachers in schools in challenging circumstances, supporting and equipping them to raise the attainment, aspirations and access to opportunity of their pupils. It has been growing as a charity and through its impact ever since, now operating in seven regions of England.

But Wigdortz is at first dismissive about having met the expectations set by the charity: "I think we haven't met expectations yet – after all, educational disadvantage is still a huge issue in Britain." Then he reflects: "We have exceeded many of these expectations that others put on us. We are now fortunate to receive support from a range of funding sources including foundations, businesses and individuals. We are set to be the biggest graduate recruiter in the country this year and received over 7,000 applications for 1,000 places last year."

Deeply unfair

His motivation to set-up Teach First came from an interesting, eye opening experience. In 2001 he was a management consultant, focusing on how financial service firms could attract the best talent, and was placed on a project looking at how business could best support schools in London. "I saw a school system that was heavily segmented by family income and huge gaps between the achievement of young people from poorer backgrounds and their wealthier peers. I knew this was deeply unfair and that these children deserved more."

A number of headteachers he spoke to said that one of their greatest problems was recruiting and retaining enough great teachers. "This was particularly true in the schools that needed them the most – those serving the least advantaged communities." So he then took a six-month unpaid sabbatical from his consultancy role to develop the business plan for what, ten years later, is a rapidly expanding charity and growing movement for social change.

"I believed that getting some of the country's best graduates into teaching and increasing the status of the profession was key to improving educational outcomes for young people. I believed we could create a new kind of graduate job that could compete with the accountancy and law firms and appeal to the heart rather than the wallet." He was also introduced to Teach For America, established 10 years earlier, and was able to learn from their experience while being careful to create something different that would work in the British context.

He was though told time and again that it wouldn't work; that no one would fund it; that top graduates wouldn't work in challenging schools; that its training model wouldn't work; and that Britain didn't 'do' movements. The 'on-the-job' training model was also criticised, with sceptics saying that teachers would never be able to have a significant impact in their first few years of teaching.

Those days of scepticism are long gone. Teach First's training provided in collaboration with some of the best universities in the country has been rated as 'outstanding' by Ofsted. It now has 1,700 teachers training in schools across seven regions and over 2,000 ambassadors (alumni of the programme) working in classrooms, schools and across society to raise the achievement, aspirations and access to opportunities of young people from low socio-economic backgrounds.

Given this, what has been Wigdortz's greatest challenge along the way? "I think this is something I go into detail in my recently released book *Success Against the Odds*: when I started Teach First, I didn't have any leadership or management experience. I knew very little about the education sector and had only been in the UK for six months. It's been a great decade of learning and improving for me personally and for the whole organisation. The problem of educational disadvantage is so deep and historic and encompasses so many difficult issues that it's hard to make sufficient progress for enough of the children we're serving. Every time I see children not receiving the education they need to make the most of their life chances, it makes me realise how far all of us still have to go."

World-class results

He cites as Teach First's greatest achievement becoming the largest graduate recruiter in the UK. But then adds: "However, the greatest achievements I've seen have been in individual schools that I've visited. Ten years ago, we couldn't find any school with a majority low-income intake in London that was doing better than the national average. Now, I can introduce you to dozens of them, some of which are achieving world-class results. Knowing that we've played some role in those transformations and the improved life opportunities for the children in those schools is the achievement I'm most proud of."

From here Teach First is looking ahead to the next ten years and looking at what more can be done to close the gaps between young people in low income communities and their wealthier peers. "We're going to continue to grow our core activity, improving our Leadership Development Programme and bringing up to 2,000 new teachers a year into the profession.

"We also want to work with our community and partner organisations to share more knowledge about what works and to test and innovate to find new ways of tackling educational disadvantage. I also want us to challenge public attitudes and motivate more people to do something to tackle what I believe to be a major human rights issue in this country. What we've seen over the past decade is that this problem can be solved. If it can happen in a few areas of the country; why not in all areas?"

He says it all adds up to a learning process where a lot more is possible than most people believe. "That's true on an individual level – I've met so many young people who have succeeded academically far beyond what they thought possible because of the hard work and leadership of their teachers.

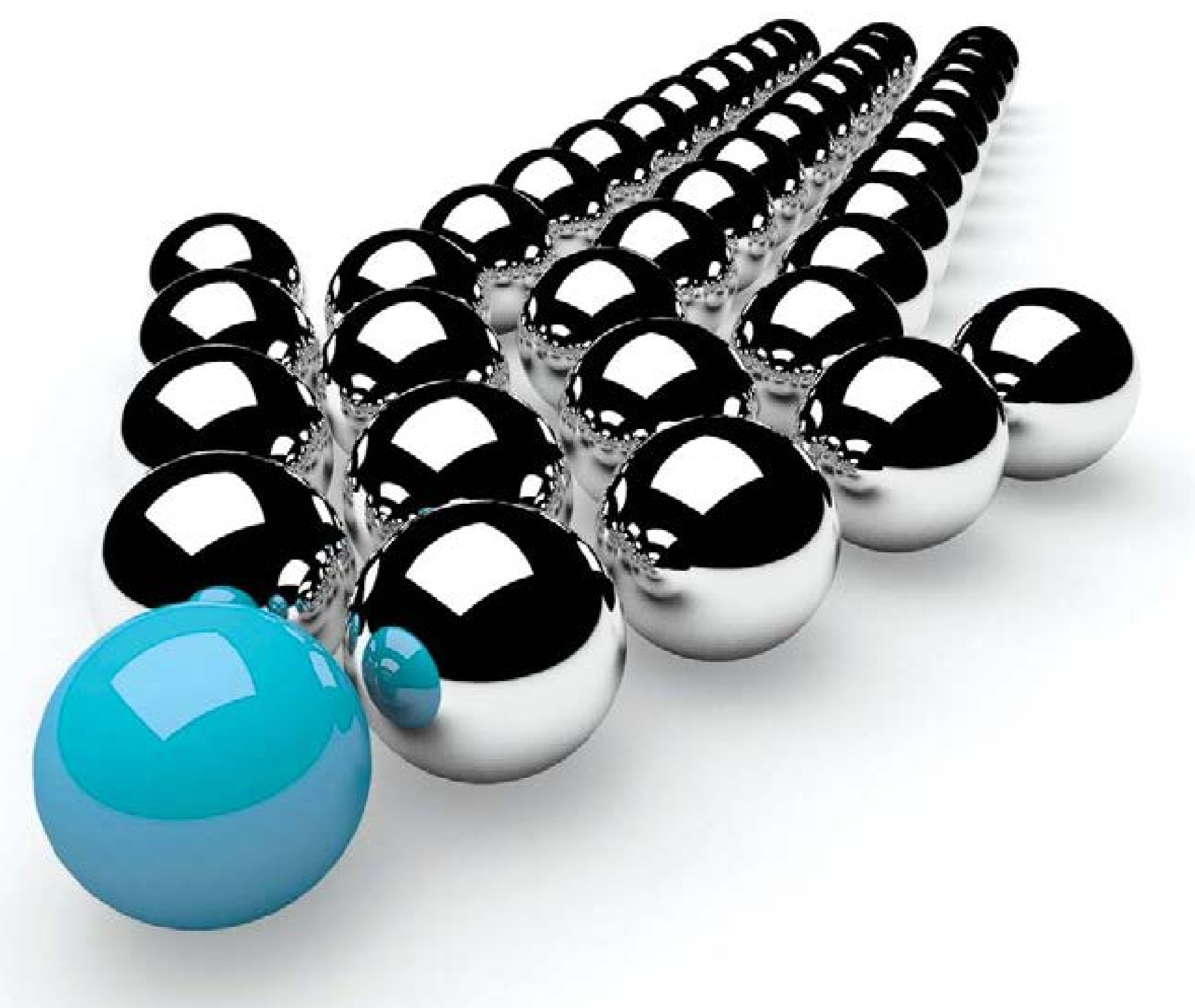
"It's also true on a systemic level. 10 years ago, few thought that teaching in a low income school would be a top career destination for Britain's best graduates. Now it is. Few also thought that children and schools in low-income communities could succeed at the level that is now seen in a number of places across Britain."

He also has some strong thoughts on how the sector could be improved. "I think competition for funding often prevents the kind of collaboration that can actually help to achieve common aims. I would love to hear from charities who share our vision that no child's educational success should be limited by their socio-economic background, about how we can work together to more effectively and more quickly reach our common goal. In the end, we could all be more successful in helping the children we're serving by working together."

And what does he make of the Big Society idea? "I don't think it's a new concept. The idea of people contributing their time and expertise to help others in society has been around a long time. When we started Teach First in 2002, many people thought that top graduates wouldn't be interested in serving others. They could not have been more wrong. The interest we've seen on campuses over the past ten years shows how much young people want to help others."

He concludes on a wider vision: "As a country we really need to take a look at what's necessary to be competitive. We must invest time, energy and resources in breaking down the barriers, both inside and outside education, that are preventing more young people from succeeding in school and in life. It makes economic sense and is morally right too. I hope that Teach First can help to make a contribution to address this and we look forward to working with others across the sector to see what else can be done to end inequality in education."

Partnerships



The right partner

Ben Cook reveals that third sector organisations will place a greater emphasis on corporate and cross-sector partnerships over the next two years. But highlights what charities should articulate in negotiations with potential corporate partners

MORE AND more charities are seeing the value in forming corporate and cross sector partnerships. As government funding for charities is slashed, linking up with business could provide some much-needed funding. But any charity thinking of jumping into bed with a partner should think long and hard about what could go wrong. If your partner has a bad reputation or a skeleton lurking in the closet, your organisation's image could end up tarnished. So, what does a successful partnership look like and how can you avoid the pitfalls of hooking up with a business?

Research indicates that third sector organisations will place a greater emphasis on corporate and cross-sector partnerships over the next two years at least. A survey published by corporate responsibility consultancy C&E in 2011 showed that 93 per cent of non-governmental organisations and 88 per cent of businesses were "confident that partnerships across the two sectors will become more important over the next three years".

The C&E Corporate-NGO Partnerships Barometer also showed that none of the 156 NGOs and businesses that responded to the survey said they anticipated partnerships between the two sectors becoming less important before 2014. The barometer also revealed that 79 per cent of all respondents said their investment in cross-sector partnerships was likely to "either increase or increase significantly over the next three years". A total of 20 per cent of respondents said they expected their investments would "neither increase nor decrease over the same period".

Why are corporate and cross-sector partnerships becoming increasingly important for third sector organisations?

A report published in March this year by charity Business in the Community (BITC) – entitled *Shared goals, shared solutions: research on collaboration for a sustainable future* – concluded that collaboration between business, public sector and non-profit organisations on social and environmental issues had increased over the past twenty years for two main reasons.

Firstly, because globalisation has "fundamentally changed the operating environment for all sectors", and secondly because the issues faced in sustainable development are "too big and complex for any one organisation to tackle alone".

C&E Advisory CEO Manny Amadi says corporate partnerships in the charity and voluntary sector are on the increase and it is a trend that is expected to continue. "On the supply-side, companies have the appetite because corporate responsibility is a very important part of companies' agendas," he says. "It helps companies engage employees and build their reputation, which is the top reason [companies form partnerships]." Meanwhile, charities want to form partnerships because of

CHARITY TIMES AWARDS CROSS SECTOR PARTNERSHIP 2012 WINNER: ADDACTION/ZURICH COMMUNITY TRUST

The partners: Addaction is the UK's largest charity supporting people with drug and alcohol problems. Their aim is to help transform the lives of people affected by drug and alcohol problems. Not only they help the individual recover from dependency, but they also offer support to those closest to them. The Zurich Community Trust (ZCT), is a registered charity, first established in 1973. The Trust supports disadvantaged people to lead more independent lives. ZCT addresses some key social issues with long-term (5-7 years plus) innovative programmes which are effective, replicable and which often tackle unpopular areas of need through Transformation programmes.

Objectives of the partnership, and how they were met: The overall aim of the partnership was to work together to help families affected by parental drug and alcohol misuse. Parental drug misuse, and in particular its effect on children within the family was chosen as Zurich's new Transformation Programme in 2004, following a period of research into the key areas of need in our communities. The decision to focus on this area of need was taken by the Board of Trustees following on the publication of the *Hidden Harm* report (2003) which recognised the damage caused to children of substance misusing parents, including the increased likelihood of the children themselves misusing drugs and the consequent effects on society as a whole.

Zurich Community Trust researched potential partner organisations to work with to deliver the programme and Addaction were selected as the chosen partner in 2005. £1m was invested in a 4 year pilot (phase 1) working with families in Derby, Cumbria and Tower Hamlets. As a result of the success of the pilot phase, an additional £226,000 was agreed to provide tapered funding to mainstream these services (phase 2) and in 2010, an additional £600,000 was allocated to use as matched funding to lever additional funds from commissioners in local authorities and other funders to expand the model to other sites in the UK (phase 3).

In 2011, an additional 10 sites were established and we on track to have a total of 36 *Breaking the Cycle* services by 2015. Zurich employees have also provided expertise in the development of the programme.

Partnership impact: Breaking the Cycle was independently evaluated by the University of Bath and a unique family evaluation tool was developed to assess the progress of the work. The results show: 81 per cent of parents stabilised, reduced or stopped highly problematic substance misuse that was impacting negatively on their and their families lives. 81per cent of parents reduced their involvement in harmful behaviours including involvement in unresolved disputes, domestic violence and crime. 84 per cent of parents acknowledged the benefits of engaging in a meaningful occupation. 87 per cent of mothers and/or fathers increased their efforts to prioritise their children's healthy development. The programme has now been rolled out and 10 new sites were developed in 2011. Already in 2012, five new sites have adopted the Breaking the Cycle model and the aim of the partnership is to bring BtC to around 3440 families by 2015.

CHARITY TIMES AWARDS CORPORATE NATIONAL PARTNERSHIP CHAMPION WINNER: CANCER RESEARCH UK/ NETWORK RAIL

The partners: Cancer Research UK (CRUK) is the largest independant funder of cancer research in the world and the world's leading charity dedicated to beating cancer through research. Over the past 40 years people's chances of surviving cancer have doubled and CRUK have been heart of that process using groundbreaking research to find new ways to prevent, diagnose, and treat cancer. Network Rail is responsible for running Britain's rail infrasturcture. They run, maintain and develop Britain's rail tracks, bridges, tunnels, level crossings, viaducts and 17 key stations to improve the safety, reliability and efficiency of Britain's railway.

Partnership objectives: To exceed a total partnership value of £1million by April 2012; to actively engage at least 30% of Network Rail's 35,000 employees; to communicate to employees the tangible impact of their support; to reach the public via Network Rail's managed stations to run award winning health awareness campaigns for a healthier Britain.

Key Partnership Outcomes: The total partnership value has exceeded £2,100,000 – more than doubling the initial target. The combination of employee fundraising, event volunteering and the participation in health fairs has engaged thousands of employees throughout the partnership. CRUK reported regular updates on the partnership through articles and inserts in Network Rail's *Aspects* magazine and on the *Connect* Intranet site. These shared fundraising highlights and communicated the impact of Network Rail's support.

A national health awareness campaign was delivered through the combination of Health Fairs, Cancer Awareness Roadshows and Station Advertisement which promoted key health awareness messages to both Network Rail employees and the general public.

Partnership impacts: This partnership resulted in a number of positive impacts for both organisations. However a significant area of focus was the development of health fairs. Network Rail and CRUK worked collaboratively to plan, organise and deliver a series of health fairs for employees.

This was the first time CRUK had developed health fairs specifically for a corporate partner and the learning has subsequently influenced CRUK's policy on health information. Cancer Research UK ran a series of 21 health fairs (with 14 occuring in 2011) including skin, bowel and lung cancer workshops. Collectively 1,496 employees attended the fairs which provided valuable information and educated staff regarding symptoms, early diagnosis and ways to reduce cancer risk. The results show how employees directly benefitted from increased awareness and knowledge of cancer and that a huge 90% passed on the knowledge they learnt to friends and family within local communities.

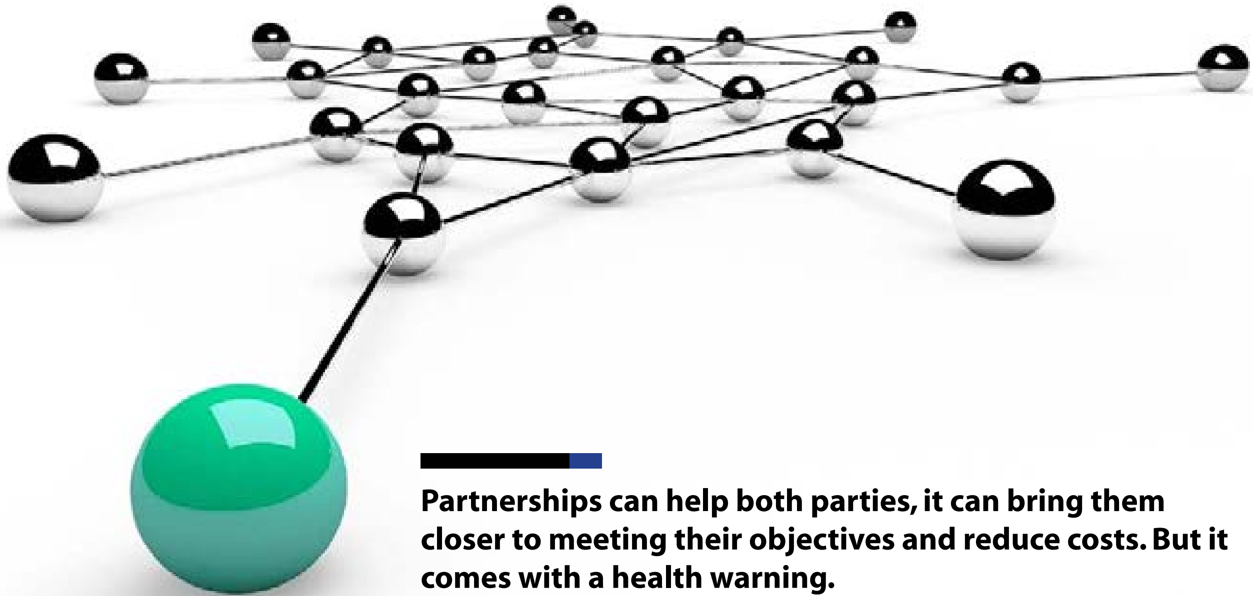
CHARITY TIMES AWARDS CORPORATE NATIONAL PARTNERSHIP OF THE YEAR WITH A RETAILER WINNER: ALZHEIMER'S SOCIETY/TESCO

Partners: Tesco selected the UK's leading dementia charity Alzheimer's Society as its 2011 charity partner. The charity supports people with dementia and their carers to live well with the condition by providing information, education and support. It also funds research to improve the lives of people today and to find a cure for tomorrow. Tesco, one of the world's largest retailers, employs over 500,000 people, serving millions of customers. Supporting communities is at the heart of Tesco's business and since 1988, they have chosen a different charity every year as the focus for staff fundraising. They have raised £64 million in total for good causes.

Partnership objectives: The partnership aimed to raise £5 million (£7.5m was raised); build a better future for people with dementia by: giving 100,000 people easy-to-access support and information through the UK's first ever Dementia Community Roadshow; helping 10,000 isolated families get specialist care and advice through our new Dementia Support services; funding two vital scientists to conduct groundbreaking research into the prevention and treatment of dementia; raise awareness of dementia among Tesco staff, customers and the general public.

Partnership impacts: During the partnership, which ran from March 2011 to 2012, there were: 4,157 staff fundraising events; 550 members of staff taking on extreme challenges; 25 new dementia supporter workers funded; 168 Dementia Community Roadshow events; 543 staff volunteers, including IT and finance pro bono support; 60,000 awareness raising leaflets distributed in 300 Tesco pharmacies.

Tesco staff benefited from the Dementia Community Roadshow. It visited Tesco car parks across the UK, allowing both staff and customers to find out more about dementia. To continue the legacy of the partnership, Tesco will work with Alzheimer's Society, other large organisations and the Government on a ground-breaking project to develop dementia friendly communities; a Number 10 priority, to help meet the needs of people living with dementia. Tesco staff will also receive training, enabling them to work well with people who have dementia. The additional £2.5 million is enabling Alzheimer's Society's National Dementia Helpline to extend its service into evenings and weekends, enabling no call to go unanswered.



Partnerships can help both parties, it can bring them closer to meeting their objectives and reduce costs. But it comes with a health warning.

C&E Advisory CEO Manny Amadi

economic constraints.

"Charities have a need in the economic context – funding from the public sector is under pressure," says Amadi.

Amadi adds that, while he would recommend that more charities get involved in corporate partnerships, there is a proviso. "It [the partnership] can help both parties, it can bring them closer to meeting their objectives and reduce costs, but it comes with a health warning – you need screening processes, because the charity might partner with a company whose reputation then tarnishes the charity," he says.

"It could also become a relationship of unequals where the charity becomes the provider for companies – the charity doesn't realise the value of their brand on offer and they become subservient."

Power of a cause

So what should charities emphasise in negotiations with potential corporate partners? "Charities bring intangible qualities, they bring their reputation as well as the power of a cause to galvanise audiences," Amadi says. "Charities also bring reach to decision makers and politicians."

What types of partnership can be formed? Research by BITC has identified five models of collaboration, they are: systems-based initiatives; project/programme-based collaborations; sharing knowledge, ideas and expertise; brand/funding-led partnerships; and social business initiatives.

BITC defines systems-based initiatives as collaborations between third sector and business organisations that have jointly developed certification or monitoring systems, often to ensure ethical standards are met. An example of a systems-based initiative is the Roundtable on Sustainable Palm Oil, which sets a trade standard related to deforestation and climate change.

A project/programme-based collaboration is usually a cross sector partnership where parties come together to address a social, local or environmental issue – an example is the Global Alliance to Eliminate Lymphatic Filariasis. Meanwhile, an example of a collaboration based on sharing knowledge, ideas and expertise is the International Co-operative Alliance, which represents co-operative businesses across the world.

According to BITC, a brand/funding-led partnership involves a small number of partners working on an issue of common interest. An example of such a partnership is the M&S and Oxfam "Clothes Exchange", which prevents clothes going to landfill by selling them in Oxfam shops. Finally, social business initiatives develop new ways of doing business in response to concerns about social and commercial sustainability – an example is Grameen Danone, which was set up as a social enterprise to address the malnutrition affecting 30 per cent of all Bangladeshis and 50 per cent of Bangladeshi children under five.

BITC international director Sue Adkins says: "Collaboration is crucial because no one group can do it [achieve their goals] by themselves. There is also greater respect for the strength and insight of other organisations, while the recession has also brought more focus on collaboration."

She adds that, for a partnership to be successful, there has to be openness, transparency and respect for the role that each partner has to play. Adkins also says it is vital that the charity communicates internally with its own staff regarding the partnership. Monitoring and evaluating the partnership is also essential, according to Adkins, otherwise you will not know whether it has achieved its objectives.

"It's important not to blindly grab any funding," says Adkins. "There are reputational risks, you could partner with an organisation that has an irresponsible way of running their business and this may tarnish the reputation of your organisation." Therefore it's important to subject your potential partner to due diligence.

"Be cognizant of why you're being approached about a partnership, take the planning and preparation seriously, find out what skeletons are in the cupboard," Adkins says. "If they've polluted a river in the past and you're an environmental charity, find out what they're doing to address that."

Not just about finance

Adkins also says it's important that charities are clear about their objectives when considering a partnership. She cites the example of a charity that may say its objective is to raise £100,000, but it could be that it's actual objective is to, say, vaccinate a certain amount of people.

This may be done more effectively, Adkins argues, by raising £25,000 and getting £75,000 worth of in-kind support from a corporate partner. "It [a partnership] is not just about finance, it's about gifts in cash, kind and time."

Alex Wooding, national corporate partnerships manager at the Alzheimer's Society, which was Tesco charity of the year in 2011 and is also a member of the cross sector Dementia Action Alliance, argues that it is important to be selective when choosing partners.

"Be honest about strengths and weaknesses, the partnership may require you to deliver hundreds of volunteering days – if you're not geared up to deliver, you may have a horrible time when it becomes apparent that you are not able to do what you said, this undermines your credibility and you may not raise the money you wanted," Wooding says. She adds that it may be that the charity's time is better spent entering two small partnerships rather than a single major one.

According to Wooding, being honest about your charity's strengths and weaknesses may enable your organisation to strengthen in the areas it is currently weak. As an example, she highlights Tesco using its high street presence to run an Alzheimer's Society information roadshow. In addition, Tesco funding allowed the charity to extend its helpline hours.

Sheryl Dago, head of business development at Addaction, which formed a cross sector partnership with Zurich Community Trust (ZCT), the charity affiliated to the insurance company Zurich, says corporate and cross sector partnerships seem to be on the increase.

"There's more pressure on corporations from government regarding their corporate social responsibility, there's also a reduction in government funds for voluntary organisations," she says. As part of Addaction's partnership with ZCT, the charity receives mentoring on business planning and budgeting. What does ZCT get out of the deal? "For insurance companies, if they reduce crime, they

CHARITY TIMES AWARDS CORPORATE NATIONAL PARTNERSHIP OF THE YEAR WITH A FINANCIAL INSTITUTION WINNER: PFEG/HSBC

Partners: pfeg (Personal Finance Education Group) is the trusted provider of knowledge, resources and support for anyone teaching children about money in the UK. It is an independent charity providing free consultancy, engaging resources and innovative programmes to creatively enable the next generation to be financially savvy. pfeg's vision is a society in which all children and young people have the skills, knowledge and confidence to manage their money well, now and in the future. HSBC Bank offers a complete range of banking services, serving 16.1 million customers in the UK and employing approximately 52,000 people. HSBC considers investment in education essential to long-term global health and prosperity and as such this is a key area for the group's charitable donations. Their education work focuses on primary and secondary education, financial education and disadvantaged children.

Partnership objectives: pfeg and HSBC joined forces in 2007 launching *What Money Means* – a five year project designed to significantly improve the financial capability of primary children. This objective was achieved by working with teachers and local authority teams; integrating personal finance education across the curriculum and providing high-quality training and resources to the teaching community.

What Money Means ran from January 2007 – March 2012, with a total donation fund of £3.4 million. It is the biggest and most successful non-governmental initiative of its kind for primary schools in this country.

Evidence of the impact of the partnership's objectives: What Money Means worked intensively with 648 teachers and 34 local authority teams across England, benefitting an estimated 23,000 pupils; 695 trainee teachers across two teacher training institutions, demonstrating the impact of reaching teachers at the start of their careers.

A highly skilled consultant team also developed 50 Lead Teachers across England, each committed to spreading the word about financial education and promoting best practice amongst teachers in their own and neighbouring schools.

Additionally, there were a range of conferences, courses and events which raised the profile of teaching about money and a training DVD went to 93,000 teachers via the Times Educational Supplement.

Volunteers from HSBC were key to the impressive reach of the project. 1,110 HSBC staff successfully completed a training programme, allowing them to help children connect what they learn in the classroom with life outside school.

In the final phase (Jan 2011 - March 2012) the many successes of the project were reviewed and collated to generate a definitive suite of personal finance teaching resources: *Learning About Money in the Primary Classroom.*

Launched in Spring 2012 it contains planning tools and stimulus materials creative enough to inspire and flexible enough to fit into many areas of the curriculum. This resource has already been ordered by thousands of primary teachers, significantly increasing the quality of their personal finance education lessons.

can increase profit," Dago says.

She adds that the fact that the commissioners of services such as those offered by Addaction – which offers drug and alcohol treatment – are moving to the "payment by results" model means that charities that provide such services are increasingly seeing the benefits of forming corporate and cross sector partnerships.

Dago says Addaction is currently in negotiations regarding securing social investment from a corporate partner, possibly in the form of a social impact bond similar to that implemented at Peterborough prison where payment is dependent on outcomes.

Learning to say no

However, the Directory of Social Change's head of sector trends, evidence, analysis and metrics Catherine Walker warns that charities should make sure they stand up to corporate partners. "Charities find it difficult to say no because they don't want to annoy the partner – sometimes [the corporate partner] wants to paint a wall, for example, as a team building exercise, but this is usually a bit pointless," she says.

"They [the charity] let them come in and paint the wall – which takes a lot of time and effort to arrange – because they think it might lead to a longer partnership but nine times out of ten it doesn't." Instead, Walker advocates "shared value partnerships", such as Samaritans link with National Rail, which she says offer "great wins for both sides".

In the case of the Samaritans partnership, suicides on railway lines were costing Network Rail millions in payments to train operators for delays; so Network Rail offered funding to the Samaritans to help them tackle the problem and associated issues.

Walker cautions that charities should give a corporate partnership careful consideration before taking the plunge. "Charities should avoid falling into the trap of getting into bed with a corporate just for the money without thinking about how it looks to supporters and considering whether there are shared values – you need to make sure the values are aligned," she says. Walker also says charities should be confident about asking for money from their partner if that is what would be most beneficial. "Corporates should give because it's their moral duty, don't be afraid to ask for cash if that's what you need."

Ben Cook is a freelance journalist

CHARITY TIMES AWARDS CORPORATE COMMUNITY LOCAL INVOLVEMENT PARTNERSHIP 2012 WINNER: BERKSHIRE EAST & SOUTH BUCKS WOMEN'S AID/ MARS CHOCOLATE UK

The partners: Berkshire East & South Bucks Women's Aid (BESBWA) is a Queen's Award winning local registered charity based in Slough which supports victims of domestic abuse. The charity supports over 3,000 victims each year by providing emergency safe house accommodation, assertive outreach and a specialist children's service which aims to help children and young people overcome the abuse they have witnessed and reach their full potential. Mars Chocolate UK has been based in Slough for 80 years. The company has an active community programme that has been running for many years in Slough.

Objectives of the partnership: the objectives of the partnership were threefold: to make a positive contribution within its local community and to support people that are less fortunate; to motivate employees to try new activities and to learn skills including teamwork skills and performance development; to be viewed as an ethnical company enhancing its corporate social responsibility credentials. For BESBWA the key objectives where to: raise awareness of domestic abuse to a new audience; and to engage with an ethical organisation which had the capacity to provide not only much needed funds for key projects but also skills which could be beneficial to the development of the charity.

Objectives met: The partnership has met its objectives, but interestingly it has developed further as each partner has learnt more about the other and feedback from employees at MARS in response to work undertaken with BESBWA has been consistently positive. This has enabled a greater synergy between the two to develop which has resulted in joint work to indentify and respond to increased opportunities for partnership work.

In 2010, BESBWA applied to MARS's *Mars in the Community initiative* and successfully secured £13,500 of funding for a sessional worker to develop Healthy Living sessions with resident victims and their children. The project was developed because research conducted by BESBWA showed that women and children living within the safehouses were experiencing high levels of mental illness which coupled with unhealthy lifestyles increased chances of obesity, mental illnesses and heart disease.

Evidence of impact: The evidence of the partnerships being met is demonstrated by the securing of a grant for £13,500 for sessional workers to develop the charity's Healthy Living Initiative. So successful has this been that the charity was able to demonstrate the need to develop the sessions into a full time role and used the evidence from the MARS funded project to develop a funding bid for three years funding to a well known trust.

The charity now employs a full-time worker to deliver Health and wellbeing sessions to children and young people affected by domestic abuse and intergenerational session with Mums. In 2011 to 2012 122 children and 91 mothers all who have been the victim of domestic abuse benefited from this project. In 2011 MARS provided advice to help BESBWA's develop its plans to launch its first ever charity shop. The advice included help with staffing and guidance about marketing. The shop is set to make £38,000 in its first year which can be used to support the on-going costs of running the charity.

Hugh Wilson finds charities understand the power of social media, but need to decide what type of strategic approach is likely to benefit them the most

Social media strategy

AS YOU'VE probably noticed, social media is everywhere at the moment. A billion people now have a Facebook page (and everyone else thinks they should probably get one). Newspapers get stories directly from Twitter feeds. A YouTube video can attract millions of views, even if it's only of a dog falling off a skateboard.

Charities know all about the power of social media, or they do if the latest Social Brands 100 list is to be believed. Charities account for three of the top six positions in the annual competition, which attempts to measure the organisations that use social media most successfully. Cancer Research UK came top of the charity ranking and fourth overall.

Three in the top six, and eight in the top 25, sounds like pretty good going, especially when you consider the competition. Charities were battling it out with wealthy private companies and important public services with far greater resources: names like Starbucks, Cadburys and the Met Office. And according to Julius Duncan, project director for Social Brands 100, it is an impressive result for the sector.

"Charities are filled with passionate people, doing something that they believe in with a clear sense of purpose.

This authenticity and passion comes through in social media, and creates strong engagement with individuals and communities," he says.

Social media is an excellent tool for delivering some of the objectives most important to charities, says Duncan, which is why many have embraced it so wholeheartedly. It's great for building awareness, quickly responding to emergency situations, and encouraging giving.

"Social media allows charities to get close to supporters, and then engage in an intensive and ongoing dialogue to show why individuals should care about the work charities do," he says.

And that, say charities, is the main appeal of social media. If you do it right, it can become a real, relationship-forming dialogue between an organisation and its supporters, or between an organisation and those who benefit from its activities. It facilitates the sort of human interaction that is much trickier to forge in emails, mail shots or TV ads.

Aaron Eccles, social media manager at Cancer Research UK, believes the charity's success with social media is down to the early adoption of a range of social media tools and a commitment to the dialogue they promote.

"We work hard to ensure our social channels are just that – a place where we can have conversations with our supporters," says Eccles.

"We try to respond to as many tweets and Facebook posts as we possibly can – and we get a lot. People come to us with questions about cancer, with ideas for fundraising and with stories about loved ones. Each of these requires a thoughtful and accurate response, and we have a system in place internally to make sure these questions are answered quickly and with the audience in mind."

Jamie Sport, social media officer for the British Red Cross (which came fifth in the Social Brands 100 list), believes Twitter, Facebook, YouTube, LinkedIn et al are a powerful accountability tool, "allowing us to give donors a clear line-of-sight between their support and work on the ground in a way that was not possible in the past."

Informed donors

All charities believe that showing donors exactly what happens to their money is one way to help shore up income streams in difficult times, and there's plenty of evidence that enthused, informed donors are the ones who keep on giving. Sport believes social media is an effective way to provide that information, and its importance to the British Red Cross is shown in the charity's most recent campaign.

"We launched our new awareness campaign, "refusing to ignore people in crisis," which highlights our work in the UK, on Facebook, Twitter and YouTube before mainstream media; our TV ad was premiered to our fans and followers first," he says.

Both the British Red Cross and Cancer Research UK are large and, by the standards of the sector, relatively well funded organisations. They can afford to put serious time and money into their social media operations. But smaller charities have also successfully embraced the social media revolution.

For example, limited resources didn't stop the MS Society placing 38th in the Social Brands 100. Chloe George, senior web and social media editor, believes the charity's success is down to doing the basics of social media well. "I think we got there partly by observing some general social media rules of thumbs," she says.

"Some of them are customer service considerations, like quick and helpful responses to enquiries; listening to what your supporters need and providing relevant content and continuing to listen to them; measuring what you're doing and using that to inform your work."

For the MS Society, social media is a great way to keep supporters and beneficiaries updated with the latest cuts in disability benefits and what it will mean for those affected by MS. But it's also a way to celebrate and motivate volunteers and fundraisers, who in turn "inspire the rest of our community."

Lots of charities have a Facebook page and a Twitter feed, but again, the MS Society's success seems to be based on maintaining a conversation with users, rather than simply having a presence. But that doesn't have to be complicated, says George.

"It also comes down to personality. We've always used our names on social media and endeavoured to let people know who we are and what we look like, chatted to our supporters and remembered to maintain a sense of humour (when it's appropriate!)."

What Chloe George also admits is that, even for a smaller charity, this sort of engagement requires quite a serious commitment. Most social media resources are freely available and free to use, but keeping a dialogue going - or fielding the sort of queries Cancer Research UK regularly receives - takes considerable time and effort.

For that reason, Caron Bradshaw, chief executive of the Charity Finance Group (CFG), says that charities should know what they want to get out of their social media activities and focus on those goals.

"What distinguishes those who do well from those who are not reaping massive benefit from it is understanding what they are using social media for," she says. "Simply having a facebook page isn't going to turn on a donation tap. Charities need to understand what they are aiming to get out of it, understand its uses and how to amend and adapt what they say, and to which audience, through it."

Strategic fundraising

There are any number of reasons for charities to use social media, from publicising campaigns and communicating with supporters to proactively raising funds. Before committing precious resources to regular updates, tweets and that all-important dialogue, charities need to decide what sort of social media strategy is likely to benefit them most.

And at the moment, despite the obvious appeal, seeking out new fundraising probably shouldn't be the be all and end all of their social media efforts, says John Suart, an expert in nonprofit marketing and communications (http://johnsuart.blogspot.com).

"One important myth to dispel is that Facebook can raise donations," he says. "For most charities, it simply can't. At least not yet."

Suart cites a recent report in the US which found that while 40% of organisations confirm that they are getting donations from Facebook, 78% of these organisations raised US$1,000 or less in the previous 12 months. "Social media is not a replacement for a website, email or direct mail," he adds.

Caron Bradshaw agrees, cautioning charities against overestimating the impact of social media as a money raiser and "putting all their fundraising eggs in one basket."

The most successful, at least according to the Social Media Brands 100 list, seem to have taken that on board. Jamie Sport says the British Red Cross only actively fundraises on social media during major emergencies, though that in itself is proving increasingly lucrative.

For Cancer Research UK too, expanding the donor base is a fairly minor part of their social media activities. More important, says Aaron Eccles, is maintaining warm relationships with existing donors, a social media strategy John Suart recommends.

"The biggest challenge that charities face today is not finding new donors, it's keeping the ones they already have," says Suart. "As a strategy, seek-and-find is an expensive proposition. What is cheaper and more effective is to try and hold on to current and past donors through some sort of ongoing engagement. Here, social media is the perfect tool."

Threats and risks

So after pouring in time and resources social media might not even expand your donor base, or at least not much. Some charities might be wondering if they should bother at all, especially if they've only dipped their toe in the water up to now with a hastily created Facebook page.

The answer is unequivocal. "There are threats and risks in social media but the risk of doing nothing is arguably far greater," says the CFG's Caron Bradshaw. "There is a permanent direction of travel towards the greater use of social media and connectivity, and pretending it isn't happening or that these things are a passing fad will mean charities miss out."

As Bradshaw points out, social media connects with all age ranges in an increasingly global market. Aaron Eccles talks about the rise of mobile devices, and how people are consuming social media differently now than they were even a few months ago.

Tom Latchford, CEO at Raising IT, adds there is no doubt social media can be a valuable tool, whether that's using social media monitoring to find people at the point of sharing something relevant or Facebook Ads to drill down to demographics likely to be interested in your cause.

He says: "The problem is that most charities do not know the value of Facebook or Twitter because they do not and cannot measure it. If the cost per acquisition for Facebook is, say, £1 per 'like' and for every person that likes us, within a year we can get 10 people to do an event for us and raise an average of £1,000, then we have the ROI for Facebook. Then it becomes strategic and scalable.

"Charities need to be like Facebook, not just liked on Facebook. Facebook grew by tapping into existing communities (universities) and everyone that joined realised that they bought more value to themselves by encouraging their close connections to join.

"Charities need to do the same by giving people reasons to share things with their networks. People share good news not bad. No videos of suffering and guilting donors. People want to be part of a movement and making change come about. If you can achieve this, you are onto a winner."

That creates challenges, but it also creates huge opportunities.

"Today we have multiple communications channels – social media, web, email, mobile, print and more," says Suart. "But a decade from now I'd hazard a guess that all of these will merge into one channel that does it all. What charities need to think about is not necessarily what social media is today but what it will become. That's why they need to get onboard soon."

Latchford sums this up: "Charities need to start small on social media and then scale. They need to start by understanding why supporters care to achieve an alignment of values, and then move on to encouraging action, whether it is through contributions or campaigns.

"Finally, charities need to cultivate their advocates – their super-supporters. Charities need to provide a seamless supporter journey, from slacktivists to superhero, from social media to their website and integrated into CRM to unite online and offline."

Hugh Wilson is a freelance journalist

A risk shared...

The government's decision to grant VAT relief on shared services late last year was another compelling reason for British charities to consider pooling their interests in terms of requirements such as IT, payroll and human resources. Although frankly, with donations down, grants reduced and the demand for charities' services rising sharply, the idea of number of charities coming together to reduce costs by collaborating with another charity or some form of third party provider is already a strong one.

With over 74% of charities considering working collaboratively with another organisation over the coming 12 months according to a Charity Commission survey, the idea has found considerable traction. Indeed, the same survey found that 45% of respondents had already collaborated with at least one charity over the previous two years.

It is easy to conceive of how hard-pressed trustees, keen to maintain the financial viability of their charity, would be drawn to the idea of what seems a relatively painless solution. But collaborative arrangements, particularly those of an informal nature in which no detailed written agreement exists, can generate risk. Trustees need to give serious consideration to these, ideally before they embark on any new initiative.

First is the question of whether a charity's existing insurance policy actually covers risks arising from collaborative working: this is a point to discuss with your broker in the early stages of negotiations with a potential partner. If both your charity and your potential partner charity each have their own insurance policies, claims can become especially drawn out as the respective insurers debate which charity should be responsible for the claim.

Second is the need to ensure that all partners maintain accurate and comprehensive records. Failure to do so could mean that a claim cannot be defended as neither partner has captured and evidenced the information necessary to mount a legal defence.

Finally, there is the sticky issue of where individual liability ends and joint liability begins. It is vital to understand the responsibilities of each partner and therefore its liabilities. These need to be documented in a formal agreement. Without this clear and shared understanding, it is not just your charity's assets which are at risk but also its reputation, arguably a charity's most valuable asset. The greater the risks, the more detailed the agreement needs to be.

Shared services are a major potential benefit to charities but while they reduce costs, they do not necessarily reduce exposure to risk. Seeking advice from your charity's lawyer and insurance broker are two immediate steps to take when considering this type of arrangement, as is letting your broker review a copy of your potential partner's insurance policy.

As all the indications suggest that shared service arrangements are going to increase over the next few years, an increasing number of charities will find themselves pondering over how best to manage these arrangements. Putting consideration of potential risks high on the agenda is an excellent place to start.

For more information on preparing to meet the demands of changing times, you can find advice and practical guidance at www.ecclesiastical.com/charityliability .

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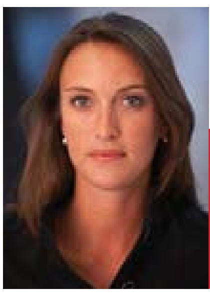
Charity Times Investment Conference:

A view from the chair



Kate Rogers gives her insightful analysis from the second Charity Times investment conference

THE CHARITY Times Investment Conference brought together a wealth of investment knowledge and experience, both from professional managers and charity finance specialists.

I was delighted to chair a high quality line up of speakers. Attendees shared an interest in investment for charities, although the purpose of each charity's assets differed from organisation to organisation.

For some, the charity assets represent reserves for a 'rainy day' fund with an emphasis on the importance of preservation. For others, such as long term endowments or foundations, the investment assets represent the key source of income or return to fund charitable activity. Whatever the purpose, we all face the same challenges of low interest rates, making income generation difficult without risking the capital value; stubborn inflation, meaning 'safe' assets do not preserve your purchasing power; and uncertainty, in both funding streams and investment markets.

After a day spent looking at how to tackle these challenges, it is clear that charities must use all the tools in their armoury to ensure that their assets can work harder to further their mission.

Challenging environment provides opportunities

The investment experts: Percival Stanion, head of global multi-asset group at Baring Asset management, Guy Myles, founder of Octopus, and Andrew Wauchope, head of charities at UBS, all gave us a glimpse of the economic uncertainties that lie ahead; whether it be the European crisis, the US fiscal cliff or an emerging market slow down.

On Europe's problem Stanion noted the underlying macroeconomic imbalances, especially the lack of competitiveness in the South, which are still there, and, as there is no agenda for growth that will decisively shift the South out of its downward trajectory any time soon; recessionary influences are likely to spread to the North.

In the US, Stanion said the poisonous relationship between Republicans and Democrats ahead of the presidential election might result in failure to reach a deal on fiscal deficits before the end of the year.

Within this, Myles cited the need for charities to embrace diversification. A point shared by Wauchope who showed that history shows that not all asset classes move in the same direction at the same time, with some assets far riskier than others. He also noted that if an investor could predict which asset classes would do best in a specific time period there would be no need for diversification.

Anthony Hilton, the financial editor of the Evening Standard, put these uncertainties into context. He was more sanguine about the economic risks, having lived through four recessions and seven banking crises. He does not believe that it is 'different this time'. He cited that in 1982 nine US banks went bust, but there was not the same emphasis on them.

Hilton noted the European crisis is likely to rumble on and UK growth will be weak but it is never as bad as it first seems. With growth figures so close to zero, it would only take the population working through lunchtime once, to stop a double dip recession.

With the possible break-up of the Euro, Hilton quipped that since 1945, 70 currency unions have collapsed, and have you noticed? So what difference will another one make?

Charities face the challenge of low returns and persistent inflation, but

Hilton encouraged investors to adapt and look for opportunities as "often in the darkest times the best returns are generated".

Importance of governance structure
We heard from a number of charity finance professionals about how each of their organisations are responding to the challenges of today's investment market, whether that be the low returns or the evaluation of risk. Danny Truell, chief investment Officer of the £14bn Wellcome Trust, examined what kills an endowment. Single stock risk, or lack of diversification was one factor that could make or break an endowment. Inflation was another that could lead to a slow painful death if assets were invested in cash and bonds and not real assets.

The third terminal risk was highlighted as liquidity – or being forced to sell assets at a bad time. He emphasised the importance of being in control of your own destiny and taking charge of these risks, through a solid governance structure that could support a long term strategy.

Charities showed they continue to build on their activities, through better fundraising, impact reporting and access to social capital

The importance of governance was also pulled out in the panel session by James Brooke Turner, finance director of the Nuffield Foundation. They have a financial governance structure that allows them to ride out the volatility in markets whilst also keeping a reserve to support three years worth of expenditure. This enables the Foundation to match their long term time horizon with their investment assets, without forgoing a stable spending budget.

Mike Cranfield, a partner at Lane Clark & Peacock also emphasised the importance of long term strategic thinking supported by a governance structure that allowed swift decision making processes.

To that end, James Money-Kyrle, director of finance and support services St John's Hospital shared their structure, which explicitly sets out the responsibilities of each committee or individual in the decision making process.

Moreover, Geoff Burnand, head of development at Investing for Good, commented on the development of the social bond market and expanding and scaling impact to charities by growing the social investment market and increasing the supply of capital.

Sector responding through innovation
I came away encouraged about the response of the sector to the low return environment. Experiences shared at the conference showed charities continuing to build on their activities, through better fundraising, impact reporting and access to social capital.

Examples were also given of charities focusing on making their assets work harder for them, either through the adoption of diversified or total return investment approaches or through the use of their assets to more directly further their aims, through social investment.

This holistic approach, using the entirety of a charity balance sheet, and thoughtful planning to maximise the charitable impact now and in the future is testament to the adaptability and innovation in our sector.

Events such as the Charity Times investment conference are important to encourage these changes, so that through knowledge sharing and collaboration we can all make our assets work harder for our charities.

Anthony Hilton noted the European crisis is likely to rumble on and UK growth will be weak.

Kate Rogers is a client director on the Charities Team at Schroders and chair of the Charity Investors' Group

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2012 Charity Times Awards Winners...

The prestigious and sector leading Charity Times Awards were celebrated on October 18th at a sparkling event attended by over 650 of the sector's most senior people at the London Lancaster Hotel.

The Charity Principal of the Year was won by Brett Wigdortz, CEO of Teach First, who the judges described as "an inspiring, fantastic leader who has driven the organisation from the top." The winner of Outstanding Individual Achievement was Lord John Walton, founder of the Muscular Dystrophy Campaign whom the judges observed was "an outstanding leader within the sector over 50 very impressive years."

The Rising CEO Star was won by Charlotte Hill, chief executive of UK Youth, who the judges said showed: "Great confidence, rigour, commitment, strong, resourceful leadership and a growth in the charity's income," marking her out as a real rising CEO star in the sector.

The Charity of the Year with an income of more than £10million was Anthony Nolan for clear evidence of excellence and achievement, meeting with outstanding results on each objective set. The Charity of the Year with an income of £1million-£10million was won by Everton in the Community for being impressively effective reaching all levels of the community and involved in a wide range of activities; and the Charity of the Year with an income of less than £1million was won by The Trussell Trust for showing fantastic growth and huge success in a wide range of disparate communities.

The Best New Charity was won by Tyne Gateway Trust for outstanding evidence and fantastic delivery in a part of the UK hit hard by the recession; the BIG Society Award was won by Living Streets for being a fantastic example of the Big Society at its very best, and the International Charity of the Year was won by Build Africa for showing outstanding results in tackling the underlying causes of poverty.

In the partnership awards, the Corporate National Partnership of the Year with a Financial Institution was won by Pfeg and HSBC, and described a "top quality partnership"; Alzheimer's Society/Tesco won the Corporate National Partnership of the Year with a Retailer because of its "exceptional partnership"; the excellent multi-layered partnership of Cancer Research UK and Network Rail won Corporate National Partnership Champion of the Year with Addaction/Zurich Community Trust winning the Cross-Sector Partnership of the year showing "a great example of the vision and work of sector organisations working together."

The Corporate Community Local Involvement Award was won by Berkshire East & South Bucks Women's Aid/Mars for sharing skills on both sides of the partnership.

The Corporate Social Responsibility Project of the Year was won by Lloyds Scholars for its impressive vision that showed excellent, real and practical results.

The Social Investment Initiative was won by Scope for a highly "innovative game changing sector initiative"; the Campaigning Team of the Year was won by Protection Against Stalking for an outstanding campaign which has achieved amazing results and transformed the legal landscape. The Fundraising Team of the Year was won by Battersea Dogs and Cats Home for an excellent example of committed, focused fundraising with first-rate financial returns.

The Financial Management Award went to Alternative Futures Group for a well co-ordinated plan implemented effectively across the organisation; the PR Team of the Year was won by Diabetes UK for a highly successful national campaign generating headlines and educational debate and the HR Management Award went to Broadway Homelessness and Support for showing the HR department was clearly central to the charity's success.

Best Use of Technology was won by the revolutionary digital technology JustGiving – JustTextGiving and Best Use of the Web was won by CARE International – Lend With CARE for its "excellent sector-corporate collaboration".

The Investment Management award was won by Rathbone Investment Management, for its "excellent charity commitment and equally good charity investment performance." The Boutique Investment Management Award was won by JO Hambro for its "excellent charity boutique management approach."

And Consultancy of the Year was won by Deloitte for its first-rate work with Cancer Research UK.

Consultancy of the year:
Deloitte with Cancer Research UK

Investment Management:
Rathbone Investment Management

Best Use of the Web:
CARE International - Lend With CARE

Best Use of Technology:
Just Text Giving by Vodafone

HR Management Award:
Broadway Homelessness and Support

PR Team of the Year:
Diabetes UK

Financial Management Award:
Alternative Futures Group

Fundraising Team of the Year:
Battersea Dogs and Cats Home

Campaigning Team of the Year:
Protection Against Stalking

Social Investment Initiative:
Scope

Cross-Sector Partnership:
Addaction/Zurich Community Trust

Corporate National Partnership Champion of the Year:
Cancer Research UK/Network Rail

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Corporate National Partnership of the Year Retailer:
Alzheimer's Society/Tesco

Corporate National Partnership of the Year with a Financial Institution:
Pfeg/HSBC

Corporate Community Local Involvement:
Berkshire East & South Bucks Women's Aid/Mars

Big Sociaty Award:
Living Streets

Best New Charity:
Tyne Gateway trust

International Charity of the Year:
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Rising CEO Star:
Charlotte Hill, Chief Executive, UK Youth

Charity Principal of the Year:
Brett Wigdortz, CEO, Teach First

Outstanding Individual Achievement:
Lord John Walton, founder of the Murcular Dystrophy Campaign

Charity of the Year with income less than £1m:
The Trussell Trust

Charity of the Year with an income of between £1m-£10m:
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Charity of the Year with an income of more than £10m:
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2012 Charity Times Boutique Investment Management Award:
J O Hambro Investment Management

This is the first year that the Boutique Investment Management Award has been given out in the Charity Times Awards, and it was created to establish a more like-for-like basis in comparing investment managers working in the charity area. The boutique award considers charity investment managers with less that £1billion in assets under management and their approach within this.

The shortlist was a very strong one, but The Charity Times Awards judges were hugely impressed by J O Hambro Investment Management's (JOHIM) style and performance citing: "An excellent boutique management approach with a very good investment track record."

Indeed, JOHIM's investment returns and all-round service for its charity clients stood out. This was evident when comparing the JOHIM charity composite to that of the WM Charity Universe: JOHIM demonstrated how its performance consistently outperformed the sector over a 10 year period.

To emphasise this further JOHIM's top grade investment performance, when assessed against the ARC performance quartile returns, consistently sat in the first quartile over a range of mandates, including cautious, balanced, steady growth and equity risk, over a 5 year period.

Furthermore, highlighting JOHIM's charity focus and commitment; portfolios, whatever their size, are managed on a segregated basis and investment goals are agreed to meet individual requirements. JOHIM emphasized it does not run a single charity vehicle or model portfolios as this inflexible approach to investment management is the antithesis of its culture.

With this boutique management approach at the heart of what JOHIM provides, it ensures that it is possible to implement the exclusion of specific investments in tailored portfolios to meet the individual ethical investment objectives of charities.

JOHIM's charity business also showed impressively how it provides trustees with a service that combines accountability with personal attention to detail. This has become increasingly important as the economic environment in which to invest has been more troubled and volatile, as seen in recent years.

Charities are an important area for JOHIM and considerable effort has been employed to develop its charity offering over the last few years. In the last 12 months, JOHIM has seen significant growth in the demand for its specialist charities business.

Added together, this, noted the judges, aptly demonstrated JOHIM's first-class investment performance, accredited to its experienced team with an average investment experience of over 24 years. Its outstanding long-term track record has now been rewarded with the Charity Times Boutique Investment Management Award.

LLOYDS SCHOLARS

2012 charitytimes Awards
Recognising leadership and professionalism
Winner

2012 Charity Times Awards Corporate Social Responsibility Project of the Year: Lloyds Scholars

The Charity Times Awards judges were immensely impressed with The Lloyds Scholars Programme which they commended as: "An impressive vision that shows excellent, real and practical results." It is this practical approach that aims to encourage and support young people from lower-income families to enter leading academic and research universities, that truly stood out amongst many corporate responsibility programmes..

As part of The Lloyds Scholars programme, 90 students are supported each year at the six partnering universities. The programme provides scholars with the opportunity to gain the skills employers are looking for through internships, workshops and access to mentors in senior management within Lloyds Banking Group. The successful programme is also supporting universities to meet their widening participation targets and helping contribute to the UK economy by educating and developing the workforce of the future. At the same time, the programme also helps scholars contribute to their local communities whilst developing their personal skills through volunteering and community work.

The localism within the programme is integral to the Group's strategy of supporting local communities. Having invested £1.6m in 2012 and with plans to further expand the programme to more universities over the next two years, these facts have been a key motivation for the Group's employees who have volunteered in their hundreds to support the Scholars.

A key element of the programme is the Scholar's contribution to their local communities. This is something the Group takes very seriously. In line with its own aspirations, the programme demands that the Lloyds Scholars give back to communities. Uniquely, the Group insists that each Scholar completes at least 100 volunteering hours per year within their local community. The benefits of this approach is not simply helping the Scholars become personally more aware and well rounded, but also helping the Group deliver on one of its objectives – helping Britain prosper. By next summer, Lloyds Scholars will have delivered in excess of 15,000 volunteering hours within communities across the UK.

The judges were impressed that the benefits to the Scholars were not simply financial. As indicated by the Scholars themselves, more than 80% believe the programme will help them improve their future employability and almost 80% say they are benefiting from the opportunity to learn new skills and experiences. Three-quarters agreed that they enjoyed learning from their contact with Lloyds Banking Group employees and many have found the contact with other Scholars and sense of community really beneficial.

Lloyds clearly illustrated its firm belief in the value of higher education and its overriding ambition that a first-class education should be readily accessible for everyone, regardless of their background or income. These fundamental principles underpinned the entire Lloyds Scholars approach.

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[1]Provisional data as at 31/12/11.

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Cazenove Capital Management is an independent, client focused business providing specialist investment management and high quality investment advice. We have been investing assets on behalf of clients for over 80 years. Today we are one of the UK's leading charity fund managers.

Specifically for charities, we offer an investment approach centred on our excellence in UK equities and fixed interest. This is supported by a strong multi-manager team, providing diversification and access to other asset classes.

Reflecting our commitment to the charity sector, we manage four Common Investment Funds that specialise in:

- UK equities
- Higher yielding UK equities
- Fixed interest
- Property

We offer both pooled and segregated portfolios.

Cazenove Capital Management Limited is authorised and regulated by the Financial Services Authority.

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For further information, please contact Francesca McSloy

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E: fmcsloy@johim.co.uk
W: www.johim.co.uk

Award Winning Boutique Approach

JOHIM's charity business provides trustees with a service that combines accountability with personal attention to detail. All charity portfolios, whatever their size, are managed on a segregated basis and investment goals are agreed to meet individual requirements. We do not run a single charity vehicle or model portfolios as this inflexible approach to investment management is the antithesis of our culture.

- Dedicated charity team
- Direct relationship with fund managers
- Strong performance
- Tailored mandates
- Institutional investment process
- Bespoke trustee training

LOTHBURY Investment Management

Lothbury Investment Management Ltd

155 Bishopsgate
London EC2M 3TQ

Contact: Lucy Williams

T: 0203 551 4900
F: 0203 551 4920
E: lucy.williams@lothburyim.com
W: www.lothburyim.com

Lothbury Investment Management Ltd.* is an investment manager of unlisted property funds with AUM of over £1bn**. We are a market leader with a team of professionals that has over 20 years experience of managing property investment on behalf of institutional investors including UK pension funds and charities seeking indirect exposure to the UK and European property markets. Implementing a core/active investment strategy, our flagship UK fund Lothbury Property Trust has delivered a consistent un-geared outperformance over Q4 2011, 1,3,5 and 10 years of the IPD UK PPFI, Balanced Unit Trust Index Benchmark. This dual strategy is effective in both downward and upward economic cycles as it is a flexible approach which capitalises on a predominately core portfolio of secure prime assets, alongside active management initiatives that increase the opportunities for value. Indeed, the Fund remained open during the downturn and has continued to take in new equity on a monthly basis during the last 18 months and currently remains open to new investment.

**Authorised and regulated by the Financial Services Authority.*
*** As at 31 December 2011*

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London EC3A 8BB

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E: charities@quilter.co.uk
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Quilter is the trading name of Quilter & Co. Limited, registered in England with number 01923571, registered office at St Helen's, 1 Undershaft, London EC3A 8BB. Quilter is a member of the London Stock Exchange and authorised and regulated by the UK Financial Services Authority.

Quilter provides bespoke investment management for private clients, trusts, charities and pension funds and has £8.2bn* in funds under management.

Award-Winning Charity Investment Management Service

- Funds under management of more than £600m*
- A diverse client base including foundations, religious orders, endowed and fundraising charities
- A charity team with local expertise across a network of 13 offices in the UK, Ireland and Jersey
- Specialist investment management with ethical screening capabilities
- Guidance for trustees on preparing investment policy statements
- Comprehensive reporting and access to portfolio valuations via our password protected website.
- A competitive and transparent fee structure

**As at 30 September 2012.*

INVESTMENT MANAGEMENT

Rathbone Investment Management

1 Curzon Street
London, W1J 5FB

Contact: Jenna McCabe
T: 0207 399 0195
E: jenna.mccabe@rathbones.com
W: www.rathbones.com

Rathbone Investment Management is authorised and regulated by the Financial Services Authority.

Rathbones welcome charity clients

We endeavour to work alongside our scope of charity clients, giving direct access to the professional managing your charity's investments and providing solutions and support. Throughout our network of UK regional offices, over 860 charities entrust £1.8 billion of funds to us, covering a wide range of charity sizes and charitable areas within the sector (as at 30 June 2012).

Rathbones evolved into an investment management firm through the stewardship of the Rathbone family wealth. Having remained independently owned and part of a FTSE 250 company, we have been able to remain true to the ethos built by the family based on Heritage, stability, stewardship and Trust. With these values we aim to forge strong, long term relationships with charities, from the national to the local.

For further information please contact Jenna McCabe on 0207 399 0195 or email:

jenna.mccabe@rathbones.com

Sarasin & Partners LLP

Juxon House
100 St Paul's Churchyard
London EC4M 8BU

Contact: John Handford

T: 020 7038 7268
F: 020 7038 6864
E: john.handford@sarasin.co.uk
W: www.sarasin.co.uk

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Sarasin & Partners LLP is a limited liability partnership incorporated in England and Wales with registered number OC329859 and is authorised and regulated by the Financial Services Authority.

Williams de Broë Limited

100 Wood Street
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EC2V 7AN

Head of Charity Services:
David Edwards
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E: david.edwards@wdebroe.com
W: www.wdebroe.com

Growth. Flexibility. Reward.

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We also include within our standard service the provision of workshop tuition to ensure that a charity's staff meet the highest requirements in respect of ongoing training.

We value highly the personal relationships that we build with our clients and believe that through a bespoke approach we are able to formulate the best possible investment solutions.

UBS

1 Finsbury Avenue
London
EC2M 2AN

Andrew Wauchope - Head of Charities
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T: +44 20756 70166

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INVESTMENT REVIEW SERVICES

CBF

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