

# charitytimes

September 2015

## Funding:

### Corporate partnerships

Finding the key to a successful corporate partnership

## Digital engagement:

### The personal touch

Effective engagement in an increasingly digital world

## Legal comment:

### Kids Company

Two sides of the coin and the changing landscape of the charity sector

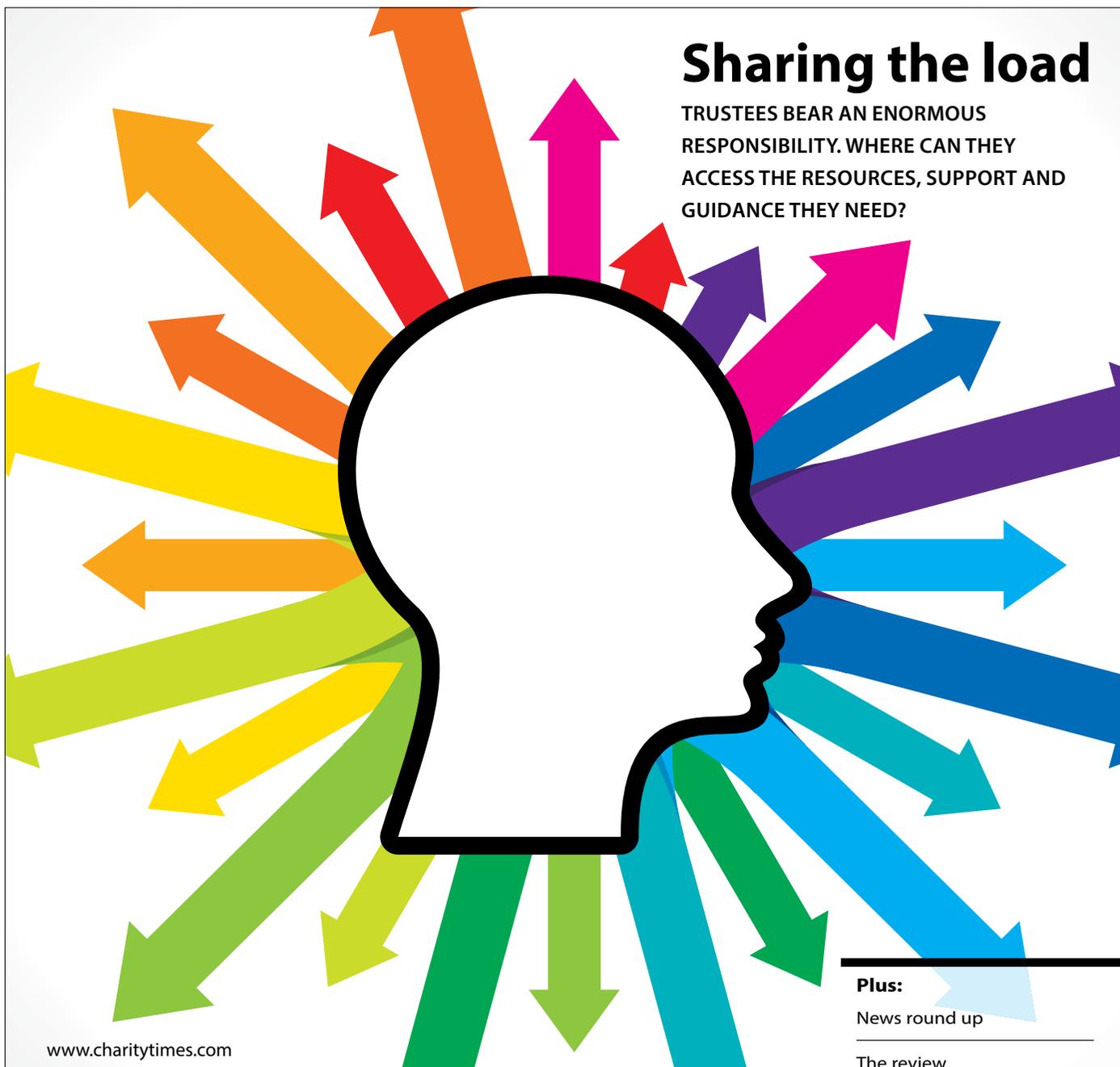
## Charity Times Awards 2015:

### Shortlist

The charities in the running at this year's Charity Times Awards

## Sharing the load

TRUSTEES BEAR AN ENORMOUS RESPONSIBILITY. WHERE CAN THEY ACCESS THE RESOURCES, SUPPORT AND GUIDANCE THEY NEED?



[www.charitytimes.com](http://www.charitytimes.com)

### CHARITY CHATTER

Commentary on the issues impacting the sector

### Plus:

News round up

The review

Sector columns

# CAF

Bank

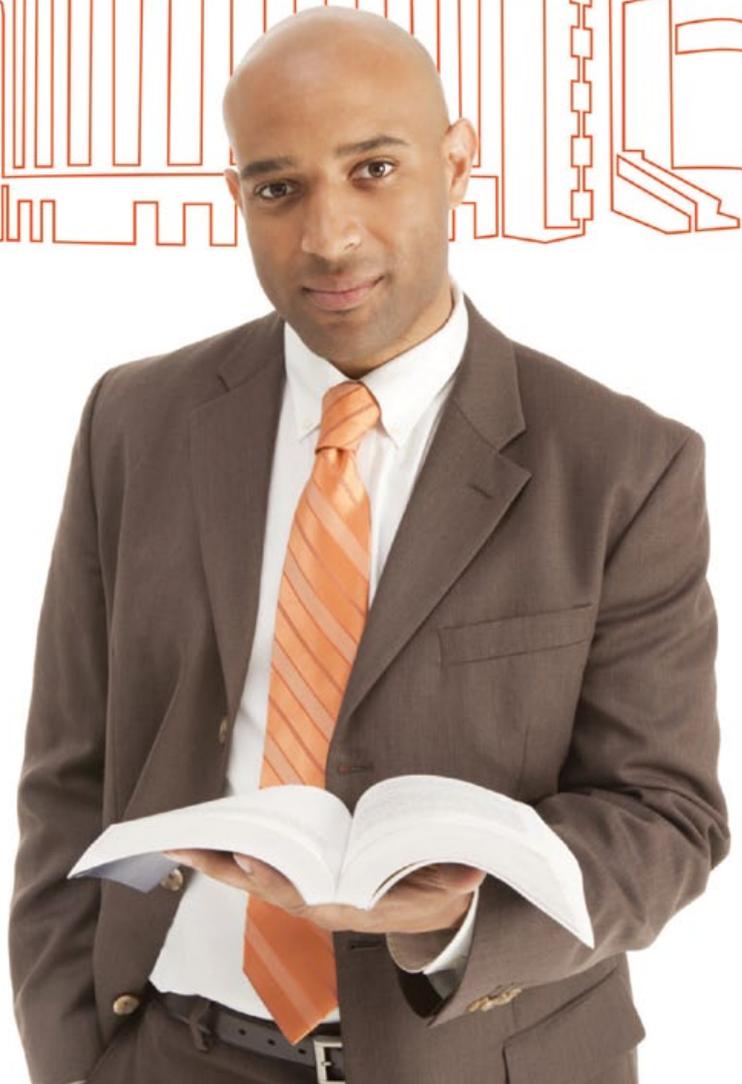
## WHEN A CHURCH NEEDS A LOAN A NOT-FOR-PROFIT BANK IS HEAVEN SENT

Christian Life Ministries (CLM) were looking for the right lending partner to help refinance their new purpose-built premises. Being the home of charity banking, CLM chose CAF Bank for its competitive terms and deep understanding of the charity sector.

The loan has enabled CLM to support a rapidly expanding congregation as well as providing banqueting and conference facilities for the local community and businesses.

Read **8 things for charities to consider when borrowing money** at [www.cafonline.org/consider](http://www.cafonline.org/consider) or call **03000 123 444** to speak to our charity loan experts.

**NOT YOUR NORMAL CUSTOMERS  
NOT YOUR NORMAL BANK**



**CAF** Charities Aid Foundation

Loans are subject to accepted application and credit assessment.

CAF Bank Limited (CBL) is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered office is 25 Kings Hill Avenue, Kings Hill, West Malling, Kent ME19 4JQ. Registered under number 1837656. CBL is a subsidiary of the Charities Aid Foundation (registered charity number 268369). Telephone calls may be monitored or recorded for security/training purposes and by calling you give your consent to this. Lines are open Monday to Friday 9am - 5pm (excluding bank holidays).

**Editor**

Matt Ritchie  
matthew.ritchie@charitytimes.com  
020 7562 2411

**Contributing Writers**

Neil Cleeveley, Sue Cotton, David Kirk,  
Jonathan Pelluet, Abigail Rotheroe, Karina  
Russell, Antony Savvas, Sara Sayer, Charlotte  
Simmonds, Antonia Swinson

**Design & Production**

Matleena Lilja  
matleena@perspectivepublishing.com  
020 7562 2400

**Advertising Manager**

Sam Ridley  
sam.ridley@charitytimes.com  
020 7562 4386

**Senior Sales Executive**

Alessandra Atria  
alessandra.atria@charitytimes.com  
020 7562 2438

**Subscriptions**

perspectivesubs@dynamail.co.uk  
01635 588 861

**Subscription Rates (6 issues pa)**

£79pa registered charities  
£119pa rest of UK, £127pa EU  
£132pa elsewhere

Printed by Buxton Press

All rights reserved. The views expressed  
are not necessarily those of the publishers.

ISSN : 1355-4573

**Published by**

Perspective Publishing  
6th Floor, 3 London Wall Buildings  
London EC2M 5PD

[www.perspectivepublishing.com](http://www.perspectivepublishing.com)

**Managing Director**

John Woods



**charitytimes**

## Help is at hand

**W**hen the last edition of Charity Times went to press the sector was in the firing line over fundraising practices. That issue has not gone away, and is sure to receive a new lease of life soon enough. A review of the regulatory framework around fundraising is due to report by the end of September.

But a new wave of controversy has washed over the sector in the wake of the closure of Kids Company. The blame game has been played hard by parties on all sides, and frankly I am not inclined to pick sides or add to the white noise around the issue.

Regardless of what the various post-mortems reveal by way of the influences on the charity's closure, issues of leadership and governance will doubtless be to the fore.

The sector's profile is high at the moment, and not for all the right reasons. It also happens to be an exceedingly difficult time to run a charity, with money tight and demand for services high. A review of the financial sustainability of the sector chaired by NCVO chief executive Sir Stuart Etherington found charities have not shared in the benefits of the economic recovery, with cuts to back-office and management capacity only adding to the challenge.

At the community level organisations fear their funding position will worsen over the next 12 months, as revealed by NAVCA's most recent quarterly member survey.

So in this issue we dedicate our cover story (p22) to where trustees can turn for help. Fortunately, there is no shortage of help at hand for the trustee who wants to up skill. Indeed, the bigger challenge could be dealing with information overload rather than struggling to secure help.

And, to close on a positive note, this issue also features the shortlist of entrants to the Charity Times Awards 2015. These candidates stood out from what was an exceptionally strong selection of entries this year.

A reminder, if any was needed, that this sector in fact makes an indispensable contribution to our society – one well worth celebrating.



Matt Ritchie, Editor



Average net  
circulation of  
9,426 copies for  
July 13 – June 14



## September 2015



### Regulars

- 06 News in brief
- 10 Appointments
- 12 Diary
- 38 Charity chatter

### Review

- 14 **Outcome-based payment schemes: government's use of payment by results**  
*by Karina Russell*
- 15 **A Tale of Two Funds: The management and performance of the Futurebuilders-England fund**  
*by Abigail Rotheroe*
- 16 **Service Nation 2020**  
*by Neil Cleeveley*

### Columns

- 18 **Branding**  
*by Sue Cotton*
- 19 **Leadership**  
*by Lisa Weaks*
- 20 **Fraud**  
*by David Kirk*
- 21 **Property**  
*by Antonia Swinson*

### Charity Services

- 45 **Suppliers Directory**



### Trusteeship

#### 22 Sharing the load

Trustees bear an enormous responsibility. Where can they access the resources, support and guidance they need?



### Corporate Partnerships

#### 30 Take the 'fund' out of fundraising

Finding the key to a successful corporate partnership



**34**

## Digital engagement

### 34 The personal touch

Online channels are increasingly important for the third sector. While the medium might change, keeping things personal remains as important as ever



**41**

## Legal comment

### 41 Kids Company

Two sides of the coin and the changing landscape of the charity sector



**25**



## Charity Times Awards

### 25 Shortlist

The charities in the running at the Charity Times Awards 2015



**LONDON-BASED CHARITY KIDS COMPANY** closed due to a lack of funding in August. The charity, that supported vulnerable children across London, Bristol and Liverpool, had been subject to a range of allegations around financial mismanagement. Kids Company had filed a petition for winding up under insolvency legislation at time of publishing.

**APPLICATIONS ARE NOW OPEN FOR THE £2M PEOPLE'S POSTCODE LOTTERY DREAM FUND 2016.** The largest ever Dream Fund to date will be awarded to charitable organisations to deliver their 'dream' projects in one or more areas of the UK in 2016 to 2018. First prize is £1m, alongside two awards of £500,000. Applications from projects that fit with one or more of the Postcode Dream Trust's charitable purposes opened in August and close on 22 September. Purposes include community development, environmental protection, health, human rights, participation in sports, and prevention of poverty. The winners will be announced in January.

**TRUSTEES FOR A CHARITY SUPPORTING DEAF PEOPLE** made a convincing case for payments to trustees being in the organisation's best interest, the regulator has found, despite such a power being absent from the charity's governing document. Deafinitions' accounts for 2013 showed three of its four trustees were benefiting privately from the charity, the Charity Commission said in a case report. The regulator said

Deafinitions' governing document only provided for payments to trustees with the commission's written consent, and this had not been obtained. However, the regulator found none of the charity's trustees were being remunerated for serving as trustees, rather, they were employed as staff members. To ensure the charity became compliant, the regulator insisted Deafinitions had a majority of unpaid trustees who could independently review payments to other board members and ensure they are in the charity's best interest.



**ADDICTION HAS BEEN AWARDED A NEW £5M CONTRACT** to provide its services to people across Herefordshire. Under the five-year contract, the charity will expand the options open to adults and young people recovering from alcohol and drug issues. The contract is £1,774,000 a year for an initial period of three years with the option to extend for a further two years. It was agreed by Herefordshire Council at cabinet level. Addaction is working with existing providers to ensure a smooth transition of staff and resources. The new service will start on 1 December and Addaction said service users will be at the heart of how it is delivered. As part of the new service, peer support and mutual aid work will be expanded, staff will develop links within the community to offer service users opportunities to build life skills and a comprehensive volunteering programme will be implemented. The charity also plans

*"The regulator insisted Deafinitions had a majority of unpaid trustees who could independently review payments to other board members"*

to offer more support groups for families, carers and friends of service users.

**THE INCLUSION OF CHARITY-SPECIFIC ADVICE** in The Pensions Regulator's new guidance on assessing the employer covenant for defined benefit pension schemes has been welcomed by the national representative body for workplace pensions. TPR has published new guidance on how to assess and monitor an employer's covenant - the employer's legal obligation and financial ability to support their scheme. The guidance aims to help schemes apply the defined benefit (DB) funding code of practice. For the first time, the guidance contains a section with specific considerations for schemes in the not-for-profit sector, and non-associated multi-employer schemes popular with charities. An annex dedicated to not-for-profits states that the absence of a profit motive does not change how the employer covenant should be assessed, but the nature of some NFPs' activities and financing arrangements means some elements of the guidance may apply differently. How organisations should apply the guidance can vary depending on the proportion of their income that comes from donations, for example. Restricted funds are also a consideration outlined in the guidance.

**LOCAL INFRASTRUCTURE CHARITIES**

are increasingly optimistic about their short term prospects but remain wary over the longer term, according to NAVCA's latest quarterly member survey. The study showed 72 per cent of respondents reported stable or increased income over the last quarter. Short-term optimism was the highest it has been in the survey's three-year history, with 61 per cent of respondents positive about the next quarter. However, 71 per cent of respondents felt their funding would get worse over the next 12 months, and 76 per cent said funding for their local voluntary and community groups would get worse. The regular survey uses a representative sample panel of NAVCA members to track trends in local voluntary action. The survey has been run every three months since July 2012, and the latest took place in July 2015. Increased demand was reported by 60 per cent of respondents, with 40 per cent saying it has stayed the same and none reporting decreased demand. Income was up for 22 per cent of respondents over the last quarter, and had remained flat for 50 per cent. Increased workload was the biggest issue in front of the majority of members, and 83 per cent of respondents planned to increase or maintain the extent of their services over the coming year.

**THE DIRECT MARKETING**

**ASSOCIATION** has published a set of guidelines for call centres on how to identify and manage dealing with vulnerable people. Age UK, Alzheimers Society, Dementia Action Alliance and Rethink Mental Illness all support the voluntary initiative, which has been produced in conjunction with companies including BT, nPower, Blue Donkey, KMB Ltd, ReynoldsBusbyLee, Orbital Response and Steve Smith. The guidelines set out step-by-step the signs to look out

for to identify consumers who may be unable to make an informed decision, such as those living with dementia or mental health issues, and how best to communicate with them. In a statement the DMA said the new guidelines are an update of guidance produced in 2012. The association will provide support and advice to companies on how to adapt their training and processes to incorporate the guidelines.



**NATIONAL CHARITY SHAW TRUST**

has opened its new headquarters in the centre of Bristol. Shaw Trust has over thirty years' experience helping disabled and disadvantaged people to gain skills and get into work. It delivers employment support to thousands of people every year on both the mainstream Work Programme and the specialist disability Work Choice schemes. The charity also provides support through a range of other activities, such as its social enterprise projects, national volunteering scheme, and a network of over 50 charity shops across Britain. Shaw Trust's head office was previously located in the White Horse Business Park in Trowbridge. The new headquarters will coordinate Shaw Trust's charitable activity, spread across more than 200 sites throughout the UK. Chief executive

Roy O'Shaughnessy said the charity chose to move to Bristol because it is a "vibrant city with a bustling economy, fantastic talent pool and great links to the rest of the United Kingdom". The move also means the charity remains in touch with its roots in the South West.

**A NEW £5M SOCIAL INVESTMENT**

**FUND** has launched in Bristol, developed and run by Resonance and sponsored by UBS Wealth Management. The Resonance Bristol Social Investment Tax Relief Fund aims to incentivise investment in charities, community interest companies and community benefit societies. It has targeted a post-tax Internal Rate of Return of about 8 per cent. The fund is open to eligible investors from today, with a minimum investment level of £10,000. It will soon be available on the UBS Wealth Management platform, and to UBS Wealth

*"Resonance plans to grow more than £30m of SITR funds in several other cities across the UK over the next few years"*

Management clients and clients of IFAs who may have a relationship with UBS. Resonance plans to grow more than £30m of SITR funds in several other cities across the UK over the next few years. But, announcing the fund's launch, Resonance said further expansion is dependent on the removal of an EU cap which effectively limits SITR investment to £275,000 for each individual organisation.

**THE CITY BRIDGE TRUST** has awarded Lambeth-based Homeless Link £148,100 over three years towards its work to improve efficiency and boost the impact of small homelessness charities. Homeless Link, a national membership charity supporting and representing organisations working directly with homeless people across England, is working to improve services for homeless people and campaign for policy change that will help end homelessness. It offers more than 500 members a range of services including advice, training, networking, and funding. The grant from City Bridge Trust will enable Homeless Link to support 67 smaller London-based homelessness charities, many of which are applying for shrinking funding. The trust said this capacity-building helps improve charities' data collection and analytical skills, so they can deliver more sustainable services based on evidence of need and have better influence over local policies and practice. City Bridge Trust, the City of London Corporation's charity, has awarded grants totalling a third of a billion pounds to charitable organisations tackling disadvantage in Greater London over the past 20 years.

**THE CHARITY COMMISSION CONFIRMED IT WOULD NOT REGISTER** Annuity Helpline, after deciding the organisation was not established for exclusively charitable purposes. Annuity Helpline's purposes are to educate the public going into retirement on all the various options for retirement income. The organisation aimed to achieve its purpose by setting up a freephone 24/7 helpline for retirees to call for advice/information. The outcome was said to be "to educate as many members of the public as possible entering retirement what benefits they currently have, what

they may lose if they give up those benefits and what options are available to them regarding retirement income". The application was rejected in July. After consideration in Decision Review, the regulator said it "was unable to establish that the organisation provided education in the charitable sense", specifically whether the service would develop the skills and competencies of service users. The commission also had difficulty seeing how the services provided by Annuity Helpline were for public benefit, rather than personal benefit to individuals achieving an



improvement to their financial circumstances. "The commission concluded that purposes of the organisation allow in scope for non-charitable purposes to be furthered and are not exclusively charitable," the regulator said. "As such, it refused the application to constitute and register Annuity Helpline as a charity because it was not satisfied that the CIO would be a charity at the time it would be registered."

**ACCESS: THE FOUNDATION FOR SOCIAL INVESTMENT** is consulting on the design of its £60m, 10 year capacity building programme. The programme will see the recently-launched foundation spend down a £60m endowment over the next decade to support more charities and

*"Charities Aid Foundation distributed £478m to good causes in the past year, compared with £443m in the previous period"*

social enterprises to be able to engage with social investment. The consultation on the programme's design will run until the end of September, with funded programmes beginning next Spring. Access was launched in March to fill gaps in the social investment market that have prevented some voluntary organisations, charities, and social enterprises from accessing finance. As well as the capacity building programme, Access is also managing the 'Growth Fund', which combines grants with loans for social lenders to offer investments of up to £150,000 to charities and social enterprises.

**CHARITIES AID FOUNDATION ACHIEVED GROWTH** in both its own income and the funds it distributed to charities in 2014/15, the organisation's annual report shows. CAF distributed £478m to good causes in the past year, compared with £443m in the previous period. Total income was £466.9m, up from £418.2m 2013/14. The amount distributed to charities by wealthy philanthropists through CAF increased by 19 per cent to just over £156m, while corporate donations from companies working with CAF reached just under £82m. CAF's social investment arm Venturesome supported another 23 social enterprises and not-for-profit organisations. Work included supporting Interhealth to create a new base in Nairobi to provide vital medical and psychological support to

health workers travelling to tackle Ebola. The Give As You Earn payroll giving service saw £70m reach charities from employees at more than 3,000 firms, while CAF Charity Accounts helped deliver £100m.

#### **CAGE DIRECTORS COMMISSIONED AN EXTERNAL REVIEW**

of the Mohammed Emwazi case, and the subsequent media coverage and interviews. In February CAGE research director Asim Qureshi was widely reported to have made public statements about Mohammed Emwazi, believed to be the ISIS militant popularly known as ‘Jihadi John’. Qureshi was reported to have raised questions around the role of counter-terrorism policy and tactics in disenfranchising individuals, and the part that played in making people vulnerable to radicalisation. A media and public backlash resulted, and in March the Charity Commission sought assurances from The Roddick Foundation and The Joseph Rowntree Charitable Trust that they were no longer funding CAGE and had no intention of doing so in future. CAGE director Dr Adnan Siddiqui said the review is an opportunity for “anyone concerned with how CAGE is changing the prevailing War on Terror narratives” to contribute to discussions that will help shape the way forward in constructive and meaningful ways.

**THE SCOTTISH COUNCIL FOR VOLUNTARY ORGANISATIONS** has launched an informal review of fundraising in Scotland to assess whether or not the current system of public charity fundraising self-regulation is working. The review, which will report back by the end of August, will be led by a reference group made up of third sector representatives. It will also include a survey on views about fundraising among members of the public,



charities with an interest in the sector’s reputation, charities who fundraise and professional fundraisers. The Scottish Government asked SCVO to conduct the review to run alongside a review of fundraising being carried out in England and Wales.

**BIG SOCIETY CAPITAL** announced in August its first investment to be successfully repaid since it was established in 2012. The redemption comes from the £2m Scope charity bond. Big Society Capital supported the bond through a £875,000 investment into Investing for Good, the social finance intermediary who arranged and underwrote the transaction. Launched by Scope in May 2012, it was one of the first charity bonds to be listed on an established stock exchange by a UK charity. Big Society Capital, along with its co-investors, has committed £374m to invest into charities and social enterprises via products such as social impact bonds, property funds and charity bonds. Over the past three years, the disability charity has used the capital raised to help open 20 new shops and to assist in growing its donor base by another 100,000 new supporters. This has enabled Scope to generate unrestricted revenues to help fund the charity’s additional programmes such as the training of parent befrienders to run peer support groups for parents with severely disabled children.

#### **MOST YOUNG FULL-TIME WORKERS**

in London want to spend more of their time volunteering, according to a new study. A survey of under-35s working in the capital found 53 per cent want to volunteer more than they do, rising to 60 per cent among 18 to 24 year olds. The number falls to 35 per cent among over-55s, the oldest age group in the survey. The study was carried out by the Centre for Charitable Giving and Philanthropy at Cass Business School, commissioned by City Philanthropy and drawing on a YouGov survey of more than 1,000 Londoners. Nearly half of under-35s agreed employees are looking for companies that aim for social and environmental value as well as business success and profit. Current and recent workplace schemes and initiatives were second to friends as the largest influence on the giving and volunteering of the under-35s surveyed, with 26 per cent mentioning its positive influence.

#### **ONE IN SIX BRITONS OVER THE AGE OF 60**

have included a charitable donation in their will, according to a new survey from Remember A Charity. The study also found that of those who had not left a legacy, 35 per cent said they would consider doing so. The survey covered 2,000 UK adults across two groups, 45 to 59 year olds and those aged 60-plus. It found 22 per cent of over 60s spent time volunteering, 47 per cent said they feel at least 10 years younger, and one third said they are more likely to seek out new experiences than they were 20 years ago.

**OVER THREE QUARTERS** of UK adults expect to donate to charity in 2015 at an average of £110 per person, new research has found. The study by Consumer Intelligence for Cambridge & Counties bank found 14 per cent of people expected to give more to charity this year.

## People on the move...

The latest appointments from around the charity sector

---

If you have any appointments to announce please contact [matthew.ritchie@charitytimes.com](mailto:matthew.ritchie@charitytimes.com)

---



### **TINA HOULIHAN**

Buckingham-based national sight loss charity **RP Fighting Blindness** has named Tina Houlihan as its new CEO. Before joining RP Fighting Blindness Houlihan was head of hospital charities at East & North Hertfordshire NHS Trust, and prior to this she was head of partnerships and major gifts at Muscular Dystrophy UK in London. RP Fighting Blindness is dedicated to finding a cure or treatment for retinitis pigmentosa, a hereditary disease of the retina.



### **JON SPIERS**

Autism research charity **Autistica** has appointed Jon Spiers as the new chief executive. Spiers joins from healthcare consultancy Just: Health Communications, where he was head of public affairs. He was previously head of public affairs and campaigning at Cancer Research UK, leading high profile campaigns on issues including cancer screening, radiotherapy and charity finance.



### **ADRIENNE SKELTON**

**Arthritis Research UK** has appointed Adrienne Skelton as strategic development director. Skelton brings 14 years of charitable sector experience to the role. She joins from Macmillan Cancer Support where she was head of evidence, contributing insight to the new cancer strategy for England, developing an external-facing data aspirations strategy.



### **ANDREW HIND**

Andrew Hind has been appointed chair of the **Fundraising Standards Board**. The new role will see Hind step down from his post as editor of Charity Finance magazine, but remain as non-executive director and strategic adviser to its publishing group, Civil Society Media. He was the first chief executive of the Charity Commission from 2004 to 2010, and previously worked in senior management at Barnardo's and ActionAid.



### **JEN PAICE**

Jen Paice has been appointed chair of **One Parent Families Scotland**. Paice has been CEO at SafeDeposits Scotland, the tenancy deposit scheme, for two years. Her previous experience includes managing strategy and business change at Lombard Asset Finance, where she also chaired the corporate social responsibility board. She chairs her first board meeting on 6 August.

# Appointments



## DAVID CROSBY

David Crosby has joined **Breast Cancer Care** as director of services and engagement. Crosby was previously general manager for Central and South West England for Macmillan Cancer Support. Prior to this he worked in social housing for 22 years. Crosby will be building on the national and regional services the charity offers to support people facing breast cancer.



## ROGER MOORS

**Social Investment Scotland** has appointed Roger Moors as its new chief development officer. Moors joins the charity and social enterprise from his role as chief executive officer of Social Enterprise East Midlands. In the past two years he has helped secure in excess of £2.5m of investment finance for third sector applicants. He also managed the £1m Nottingham Social Impact Fund providing finance to start-up social businesses.



## JONATHAN PELLUET

Children's communication charity **I CAN** has appointed Jonathan Pelluet as director of fundraising. Pelluet started his career in the financial sector, including at market data company Thomson Reuters. His fundraising career has seen him spearhead FareShare's corporate partnerships programme before leading Revitalise's fundraising efforts.



## POLLY SHUTE

National youth volunteering charity **vInspired** has appointed Polly Shute as director of fundraising and communications. Shute was formerly fundraising project and campaign director at British Heart Foundation. vInspired has recently undertaken a strategic review, and Shute will be responsible for securing new sources of funding to support plans to increase youth participation in social action.



## CHRIS SHERWOOD

Relationships charity **Relate** has appointed Chris Sherwood as chief executive. Sherwood was previously director of policy, communications and digital services at the charity. He was previously director of innovation and development at Scope, and a senior development manager at Nesta. Sherwood has over 10 years' experience of working in the voluntary sector and prior to this he worked in Westminster and local government.



credit: Ruth Davey

## BARONESS RENNIE FRITCHIE

**Lloyds Bank Foundation** for England and Wales has appointed Baroness Rennie Fritchie DBE as its new chair. Baroness Fritchie's experience includes a post as chair of not-for-profit IT company Nominet, as an independent crossbencher in the House of Lords, and the patron of charities including Winston's Wish, Pied Piper Appeal, and Odyssey.

# September 2015



**CHARITY TIMES AWARDS 2015**  
**7 October 2015**  
[Park Plaza Hotel, Westminster Bridge, London](#)

The Charity Times Awards reaches its sixteenth year in 2015. The Charity Times Awards continues to be the pre-eminent celebration of best practice in the not-for-profit sector. The awards reward the work carried out in difficult and competitive conditions, and establish a unique annual congress of the pre-eminent figures in the sector at the premier charity event of the year.  
[charitytimes.com/awards](http://charitytimes.com/awards)



**ACEVO AUTUMN HEALTH & SOCIAL CARE CONFERENCE**  
**21 October 2015**  
[Harehills Rd, Leeds, West Yorkshire LS8 5HS](#)

ACEVO's health and social care conference returns to Leeds, to consider what this parliament has in store for third sector organisations working in health and care. Delegates will hear from political representatives as well as experts on the critical issues. This is the opportunity for third sector leaders to debate, learn and reflect on the next five years.  
<http://bit.ly/1LkNmW5>



**TACKLING FRAUD IN THE CHARITY SECTOR**  
**31 October 2015**  
[Royal College of Physicians, 11 St Andrews Place, London](#)

Fraud is a serious threat to every organisation – and charities are no exception. This conference will bring together senior figures from the charity and counter-fraud worlds to discuss the challenges charities face, highlight current risks, and share best practice. Speakers include representatives from: British Council, Cifas, Help for Heroes, and Institute of Business Ethics.  
<http://bit.ly/1E3xFQH>

## Not to miss...

**SOCIAL MEDIA RISKS FORUM**  
 15 October 2015  
 St. Pancras Renaissance London Hotel  
[socialmediarisks.co.uk](http://socialmediarisks.co.uk)

**ACEVO ANNUAL CONFERENCE 2015**  
 19 November 2015  
 Victoria Park Plaza, London  
<http://bit.ly/1LjblwH>

**NCVO/BWB TRUSTEE CONFERENCE 2015**  
 2 November 2015  
 Kings Place London  
[ncvo.org.uk/training-and-events/trustee-conference](http://ncvo.org.uk/training-and-events/trustee-conference)

**BETTER SOCIETY AWARDS 2016**  
 12 May 2016  
 Millennium Hotel, Mayfair, London  
[charitytimes.com/bettersociety](http://charitytimes.com/bettersociety)



What does this parliament have in store for third sector organisations working in health and care?

With the devolution agenda picking up pace and mental health proving a big General Election issue, this conference will focus on the critical role of the third sector in helping to drive changes across the health and care system.

Register today at  
[www.acevo.co.uk](http://www.acevo.co.uk)

Free event for  
ACEVO members



Autumn 2015

Health and Social Care  
Conference

Sponsored by 

Wednesday 21 October 2015  
Shine - Harehills Rd, Leeds LS8 5HS



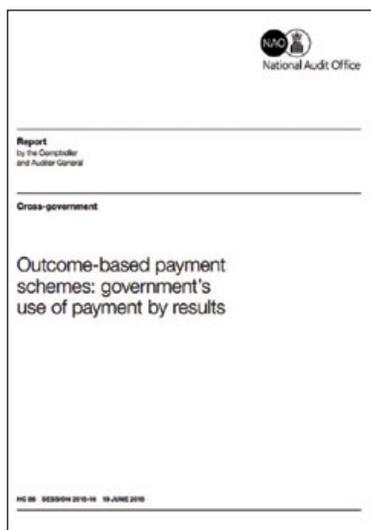
**acevo**  
Charity Leaders Network

Find us: [www.acevo.org.uk](http://www.acevo.org.uk)  
Email us: [info@acevo.org.uk](mailto:info@acevo.org.uk)  
Follow us: @acevo  
Call us: 020 7014 4600

MEDIA PARTNERS:

**charitytimes**

**Third  
Sector**



**T**he NAO report into outcomes-based payment schemes raises serious questions about the evidence base for Payment by Results contracting's effectiveness.

The principle of PbR, that providers should be financially accountable for the outcomes they deliver, is difficult to object to, especially for an organisation with a mandate to assess value for money. The NAO's report therefore focuses on practical considerations.

The report highlights that PbR contracts are not suited to all public services, and if applied inappropriately there is a risk that quality of the service and value for money are undermined. The NAO remind us PbR is a technically challenging form of contracting, and commissioners need to understand the potential provider's capacity to take on risk. This includes looking further down the supply chain at the issues voluntary sector subcontractors have faced working with prime contractors, including the extent to which risk is allocated and the types of work referred to them.

NCVO have long been aware that PbR contracts can limit the involvement of expert voluntary sector organisations in crucial public services. The Work Programme is a case in point.

Research we conducted with BWB in 2012 of voluntary sector organisations' experiences of the Work Programme found serious cash-flow problems for

## Outcome-based payment schemes: government's use of payment by results by NAO

KARINA RUSSELL FINDS THE NATIONAL AUDIT OFFICE'S REVIEW RAISES SERIOUS QUESTIONS ABOUT THE EVIDENCE BASE FOR PBR'S EFFECTIVENESS AS A MECHANISM

KARINA RUSSELL IS PUBLIC SERVICES POLICY ANALYST AT NCVO

charities, with 70 per cent of respondents fearing their contracts would not be viable for the full term, and nearly half subsidising service delivery with their own reserves. We also found 50 per cent of respondents received fewer than 10 referrals a year into the scheme. This led to a number of charities feeling they had no choice but to withdraw completely from the programme.

Although the NAO's report focuses on the application of PbR, reading between the lines it is possible to identify more fundamental concerns. It highlights the almost non-existent evidence base for the government's use of PbR for public service contracts and calls on the Cabinet Office and the Treasury to build a repository of information and expertise that can inform future use. But if there is a lack of credible evidence, how do we know that PbR works at all?

This wouldn't be the first time outcomes-based commissioning has been questioned. Newcastle University's Toby Lowe has argued PbR is intrinsically flawed and creates unwelcome paradoxes. He is one of many who argue that instead of improving the lives of service users, a focus on outcomes distorts organisations' priorities, making them more inclined to focus on service users who are easiest to help, neglecting those most in need and sometimes even exaggerating the outcomes they've achieved. This may explain the Work Programme's notable failure to make a difference for those furthest from the labour market.

Meanwhile, the complexities of issues in a service user's life can make it near impossible to trace any outcomes back to an organisation's intervention. Those with the most complex needs have factors that can affect their lives that an organisation intervening has no control over, from relationships to local job markets. As such, Lowe argues it's unreasonable to hold them to account over outcomes.

The NAO report echoes what our sector has been saying for a long time and for those with an interest in public service delivery it gives us a lot to think about. Which services are most appropriate for PbR, the most effective payment models and even whether PbR should be used at all are matters for discussion. This debate desperately needs a stronger evidence base and until that happens, supporters and sceptics alike should keep an open mind about the effectiveness of outcomes-based payment schemes. ■

## A Tale of Two Funds: The management and performance of the Futurebuilders-England fund by Boston Consulting Group

ABIGAIL ROTHEROE FINDS IT REMAINS DIFFICULT TO ASSESS IN DETAIL HOW THE FUND PERFORMED

ABIGAIL ROTHEROE IS DEPUTY HEAD OF CHARITIES AT NPC

The Boston Consultancy Group in July published a report into the performance of Futurebuilders between 2004-2010, one of the largest social investment funds in the UK. Big Society Capital has called it ‘perhaps the big social investment initiative of the noughties,’ and it disbursed £145m over 10 years to more than 360 organisations.

Beyond the numbers, there are important details. The report clarifies, for example, that loans were only made where organisations didn’t have access to cash from other lenders—which ensured Futurebuilders didn’t undercut the market, but also helped get money to causes which may otherwise have been ignored.

There is insightful analysis, too, of which organisations defaulted on their loans. Where they received both grants and loans, they were more likely to miss repayments, whereas those just getting loans appear to have paid back the cash more reliably. There is no further breakdown of this data, but it may be that organisations on a stronger financial footing were well placed to receive and utilise loans, while a mix of loans and grants went to bodies which were less financially secure (and a higher risk).

The report explores how social investment can interact with other parts of the charity landscape. Futurebuilders made loans to organisations to help them bid for government contracts, and expected them to then use contract payments to repay the initial loan. This is an innovative approach to squeezing the greatest possible leverage from Payment by Results contracts. Such innovation is to be welcomed, even if the main thing is to learn from its failure: when organisations didn’t win contracts, there was no money to pay back the loan. As the report drily notes of contract repayment, ‘this was often easier said than done.’ But it remains difficult to assess in detail how the fund performed.

Firstly, it’s a pretty partial picture. We have information only on investments where lending has now ceased (the closed portfolio), which represents just 20 per cent of the fund’s total capital. Data on the rest of these investments is probably many years away.

As a result, it would be unwise to draw too many conclusions about the fund. The report reveals that the closed portfolio yielded a negative Internal Rate of Return of



-3%, "arguably more positive than might otherwise have been expected" given the newness of the investment and the complexity of the market. It was also doubtless affected by a welcome policy of not penalising charities who repaid early, although these funds were not recycled back into the charity sector.

The picture will become much clearer when the data surfaces from the remaining 80 per cent of investment. Such data could be crucial to everyone interested in funding social enterprises. It could inform funding decisions for charities long into the future. But it is still way too early for that.

There is one more omission to mention, even if it’s understandable. There was evidently no effort to measure the social impact of all these loans and grants (such measures were ‘predominantly absent throughout the majority of Fundbuilders’ lifetime’ as the report fairly notes). But as impact measurement becomes increasingly widely spread, fewer social investment funds will have this excuse.

Ideally, the future will see the publication of the financial performance of social investments to date - a journey started by this report and by the social investment market through a data lens. It is imperative that we know what difference it makes on the ground where it matters. It’s time to get that ball rolling too. ■



**S**ervice Nation 2020 is an attempt by Demos to pull together existing evidence to make a compelling case for the value of youth social action. They define social action as “practical action taken in the service of others”. Whilst their definition includes volunteering it encompasses a much broader range of action. The report looks at the value to participants and the ‘double benefit’ social action brings to society.

The authors successfully pull together a wealth of relevant research and will be of use to others working in this field. However, its recommendations are a throw-back to another era. They call for new funding, a cross government strategy and an independent coordinating body. All laudable objectives but completely out of step with the age of austerity. They offer no consideration of what is currently delivered and whether it is possible to deliver it in any other way - or make any savings that might be re-invested. It's as if we have been transported back to the 2000's.

However, the report will bring joy if you are a player of ‘recommendation bingo’. You can tick off the classic ‘they should teach this in schools’ and ‘have trip-advisor style ratings’.

Demos say they are a cross-party think tank. This may explain the lack of politics in the report. At a time when young people have been major victims of cuts,

## Service Nation 2020 by Demos

NEIL CLEEVELEY FINDS DEMOS' REPORT SUCCEEDS IN MAKING THE CASE FOR THE 'DOUBLE BENEFIT' OF YOUTH SOCIAL ACTION, BUT FAILS TO UNDERSTAND THE BIGGER PICTURE OF WHAT AUSTERITY IS DOING TO LOCAL SERVICES

NEIL CLEEVELEY IS CHIEF EXECUTIVE OF NAVCA

the report ignores any impact this may have on youth social action. It also fails to acknowledge that young people from different backgrounds may have very different experiences in their access to activities and opportunities. It does not consider whether there could be benefits to young people or society by providing targeted support.

I was also disappointed that the report doesn't dig deeper in to the value of the National Citizen Service. This programme is now the biggest single government investment in this area, so it warrants more attention. The report does not question whether they have the right approach to supporting youth social action or whether its aims could be achieved in a different way. The report trumpets that the evaluation of NCS shows it brings in between £1.70 - £6.10 of benefits for every pound spent. As well as appearing a broad and therefore meaningless range, is this even impressive? A quick google search tells me that £1 of investment in flood defence brings back £8, museums report £10 return for every £1 of public money spent and marketing the National Forest in Derbyshire brings in £24 for every £1 of public money.

A quote used in the report questions whether the Government is “putting all their eggs in one basket” with NCS and that greater success will be achieved by rooting national youth action programmes in local activity. I have to say I share this view. The report offers some backing for this view by saying that it is vital to maintain “a plurality of providers across the lifestyle”. However, the authors then fail to show they understand that cuts to local government funding have devastated local services for young people – both services traditionally delivered by local councils and by local charities – making this “plurality of providers” much harder to achieve in communities.

Overall this report left me unsatisfied and wondering exactly what the authors were hoping to achieve. Whilst it does succeed in making the case for the ‘double benefit’ of youth social action it also fails to understand the bigger picture of what austerity is doing to local services. My first reaction to this report and the recommendations is that I've heard it all before. Further reflection though leads me to a more generous conclusion. Maybe the problem is not the weakness of this report but more the fault of Government for not doing enough to support local youth action. I welcome this attempt by Demos to champion support for young people and youth action but maybe there are times when even a cross party think tank needs to get off the fence. ■

# Social Media Risks

Understanding and building strategies that mitigate risk

## Social Media Risks Forum 2015

15 October 2015, St. Pancras Renaissance London Hotel

The Social Media Risks Forum, led by key industry speakers including Accenture, Bell Pottinger Digital, Cass Business School and J Arthur Consulting will explore all the issues, legal, technical and social, and effective strategies to create effective control and bring benefits to organisations of all types.

- Reputation risk • Compliance • Legal issues
- Security (leaks and invasive) • Social sabotage by an employee
- Trolling and brand terrorism

Regular early bird rate: £495

Charity discounted rate: £345

To get this preferential charity rate, please contact [hammad.uddin@perspectivepublishing.com](mailto:hammad.uddin@perspectivepublishing.com)  
+44 (0)207 562 2422 and quote your charity number.

Speakers include:

**accenture**  
High performance. Delivered.

**Bell Pottinger**

**GSF**

**Cass Business School**  
CITY UNIVERSITY LONDON

**Harbottle & Lewis**

**J. ARTHUR CONSULT**  
RISK REASON RESILIENCE

**REGISTER LARKIN**

**SOCIAL MEDIA CHARTER**

**ZURICH**

**DO YOU WANT TO PROTECT YOUR ORGANISATION AGAINST REPUTATIONAL RISKS?**

Media partner

**charitytimes**  
FIRST CHOICE FOR NON-PROFIT MANAGEMENT

**Register Now:**  
[socialmediarisks.co.uk](http://socialmediarisks.co.uk)

**Download Brochure**

## Branding

**SUE COTTON ARGUES THAT IN AN INCREASINGLY COMPETITIVE ENVIRONMENT, CHARITIES NEED TO STAND OUT FROM THE CROWD TO WIN CONTRACTS, GRANTS, AND SUPPORT**



**SUE COTTON IS  
CHIEF EXECUTIVE  
OF CANW**

**O**ur roots have always been in foster care, and in the North West of England, but in the last five years we've countered a more demanding, leaner marketplace by diversifying both geographically and in terms of the services we offer, covering areas such as therapeutic services, youth justice and working with vulnerable adults and young carers.

It's an evolution that's helped to grow the organisation and keep us relevant as service provision has changed, but it started to become apparent that our name and branding were becoming something of a drawback. Having 'child' in our name meant some service users and commissioners questioned our ability to provide specialist services for youths and adults.

The 'North West' part of our title also presented issues: if we were trying to demonstrate a local approach commissioners might query our knowledge of, say, Salford; if we were looking to gain contracts outside the North West we'd sometimes face questions about whether we could scale up enough to take on work beyond our home region.

We were aware we needed to address our brand and reposition ourselves to give stakeholders a clearer vision of our aims and values, so when we were approached to be the chosen charity of the year for marketing agency Jaywing we knew we had a fantastic opportunity to examine our profile and make some changes.

I think a lot of people still see a rebrand as just a change of logo and colours, but it's so much more than that: the whole process took us around 18 months and a lot of consultation with staff, service users, commissioners and trustees. You can't just change your logo and say "there you go, that's us", it's about creating something your stakeholders believe in and that sums up your values and aims – there's a lot of people to please.

For any charity that's looking to rebrand I'd say the first step is to be clear about what you're going to get out of rebranding, because you have to sell that to people internally.

Winning over a board of trustees can be difficult, but it's much easier if you can show them the

strategic benefits. Feedback from our consultations with commissioners, staff and service users showed they felt very strongly there was a need for change, and once the board could see that, they were 100 per cent behind the rebrand.

Changing our name was something of a sticking point because of the charity's heritage. We went with CANW because that's how we're known locally and it seemed like a natural progression. Once our stakeholders saw the name in the proposed branding, everything started to fall into place.

A lot of our work with Jaywing was about identifying and distilling down what it is we do. CANW's aim is to help children, families and individuals with the full range of issues they're experiencing and focus on what they can do as a starting point to support them. We developed this into the "we can" message that runs throughout our new branding.

It's a message that spells out clearly to commissioners and service users that we're able to achieve great outcomes across a range of services and conveys the positivity that runs through the whole organisation, in every aspect of what we do to sustain change.

The colours and imagery we developed for the brand convey much more strongly the warmth and care we generate as an organisation and really make us stand out to commissioners, fundraisers and service users – feedback on our old branding suggested it looked a bit like a hospital!

The rebrand has given us the opportunity to hit the reset button and to communicate more effectively the full breadth of interlinked services CANW offers.

It's a move that will help to ease the transition as we diversify geographically and in terms of services, and gives us a figurehead brand to encompass what we do in a much more modern, relevant way.

It's vital charities embrace change in the current climate, but it's important not to see a rebrand as a quick fix: it's a long process, but ultimately one that should enable you to shout about who you are, what you do and most importantly what you can deliver. ■

**Leadership****LISA WEAKS ASKS WHETHER THERE SHOULD BE MORE DISCUSSION ABOUT THE QUALITY OF LEADERSHIP IN THE SECTOR**

**T**he third sector has been under scrutiny in recent months, where organisations' management and leadership have been called into question. Is enough emphasis and thought devoted to leadership styles, the culture this creates and whether this fully reflects the organisation's aims and ethos?

The NHS has invested considerable resource and time in understanding these issues and in developing its leaders, partly in response to well publicised failings in leadership in NHS organisations. Mid Staffordshire Hospital Trust was one such case, where leadership failings resulted in appalling care for patients. This prompted the acknowledgement that to create a culture of compassionate care, it is vital to develop the people who lead NHS organisations.

Third sector leaders face many of the same challenges. The sector needs highly skilled leaders who can foster empowering organisational cultures. They need to be able to adapt, collaborate and thrive in increasingly competitive, complex environments.

We are often told by third sector leaders that they feel isolated and that being a CEO can be a 'lonely' and unsupported place. They report they rarely get time away from their organisation to reflect, be challenged, to learn about new ways of working, and ultimately to make themselves more effective. We find that third sector organisations rarely have the resources to pay for leadership development and there are very few high-quality leadership programmes designed around their needs.

The King's Fund supports third sector leaders, funded by GSK, through the GSK IMPACT Award Network – a unique learning network of 62 award-winning charities working in health and care, virtually none of which have the resources to invest in their own leadership. These organisations may have received a small amount of money from elsewhere to work on specific areas of organisational development, sometimes as a top-up from a grant, but this is not the same as dedicated leadership development.

So what does good leadership look like?

There has been a tendency to see leadership as based on a strong individual with a personal vision, a 'heroic' leader. Our research instead highlights the benefits of collective leadership – whereby everyone takes responsibility for the success of the organisation as a whole, not just their own jobs or area. Where cultures of collective leadership thrive, all staff members are likely to attempt to solve problems, promote responsible, safe innovation and, in the NHS, ensure quality of care.

The single most important task for a leader is to create the right organisational culture. Culture is a set of shared behaviours and implicit assumptions that members of an organisation hold and that determine how they perceive, think about and react to things. Every interaction in an organisation both reveals and shapes its culture. For instance, how staff talk to or about service users, how they talk to each other – if new staff or volunteers observe senior staff behaving aggressively or brusquely, this becomes assimilated.

Emotional intelligence is important to all of this and can enable leaders to adapt to different situations and stakeholders. Leaders need the capability and willingness to reflect on what is happening, including their own behaviour and the impact this has on their staff, volunteers and partners. Developing empathy is important for leadership, being able to answer the question 'what is it like to be on the receiving end of this?'

Many third sector organisations are reliant on public sector commissioners or high-profile funders for income. This can lead to a frustrating power imbalance where maintaining authority, autonomy and confidence can be challenging. Third sector leaders therefore need negotiating and problem-solving skills, and the ability to respond to different situations flexibly and effectively.

So, should funders, commissioners and third sector leaders (and their boards) be talking more about third sector leadership, acknowledging what it is and why it is so important? Can they afford not to? ■



**LISA WEAKS IS  
THIRD SECTOR  
MANAGER AT THE  
KING'S FUND**

## Fraud

### DAVID KIRK ON THE RISKS TO CHARITIES AND WHAT PREVENTATIVE MEASURES CAN BE TAKEN



**DAVID KIRK IS  
CHAIRMAN OF THE  
FRAUD ADVISORY  
PANEL**

**F**raud is a serious threat to every organisation, business and individual – and charities are no exception. The opportunities for fraudsters to take advantage of weaknesses in their defences are increasing at the same pace as the technology that governs all our lives. The threat from cyber-enabled fraud – involving sophisticated attacks on business systems – is matched by old-fashioned theft, impersonation and fraud that can be perpetrated both from outside the charity, and from within.

Research from the National Fraud Authority previously found that the most common types of financial crime affecting the sector are payment / banking fraud, accounting fraud and identity fraud while just under a quarter of these frauds were enabled from within the charity. The very nature of a charity, full of good intentions, generosity and trust, perhaps adds to the vulnerability to fraud risk of the sector.

Research commissioned by the Fraud Advisory Panel has found that almost half of all detected fraud is discovered through a charity's internal controls or audit processes.

The problem is that internal controls and audit, which are the backbone of large organisations, can be difficult to manage for the vast majority of small charities that cannot afford to have the level of professional support that they might need. A significant proportion of charities surveyed (particularly smaller ones) did not have any common anti-fraud policies and procedures, risk registers or fraud response plans in place. No doubt some of them thought that fraud will never happen to them, so there is no point in spending precious time and money on any counter-fraud measures.

The fact is, however, that the impact of fraud, large or small, extends well beyond the direct financial loss resulting from the fraudulent activity. The inability to fund specific projects and activities will, of course, be devastating, but reputational damage can be even more compromising. Concerns about the financial competence of a charity will very quickly lead to a reduction in donations. The impact on the morale of staff, including volunteers, should also not be underestimated. With charities relying very heavily on volunteers, loss of trust may

quickly result in staff losses. It is therefore vital for charities of all sizes and types to build strong fraud defences to protect income and assets and meet their duties.

A framework for assessing fraud risk and a robust system of internal financial controls are the key elements of good fraud avoidance. This kind of approach will help to sharpen an organisation's focus on how to prevent, detect and respond to fraud. The Charity Finance Group, in association with the Fraud Advisory Panel, and others, has produced a helpful guide for trustees and managers on fraud prevention which highlights the following steps:

- Instil a culture of ethical behaviour throughout your charity;
- Develop an anti-fraud policy;
- Understand your risks (take regular assessments of the risks your charity might be exposed to);
- Implement robust financial controls and reinforcing the importance of these (use the Charity Commission's CC8 guidance and checklist for reference);
- Ensure there are robust recruitment procedures;
- Develop a whistleblowing policy, encourage awareness throughout the charity by communicating anti-fraud measures and training staff; and
- Keep records of suspected and confirmed fraud.

The Charity Commission and Fraud Advisory Panel are hosting a one-day fraud conference to equip trustees and managers with the knowledge and skills needed to recognise the tell-tale signs of fraud and shape an effective response.

The conference, which is supported by a range of sector bodies, will bring together leading practitioners and senior figures from the charity and counter-fraud worlds to discuss the challenges charities face, highlight current risks, and share best practice.

Confirmed speakers include representatives from the British Council, Cifas, Help for Heroes, Institute of Business Ethics, Oxfam GB, and Save the Children International. ■

## Threats and opportunities in a hot property market

### SO COULD YOUR CHARITY END UP ON THE STREETS?.....

The Ethical Property Foundation has been advising not-for-profits with their property problems since 2004, over 3,000 clients to date, plus many thousands more who consult our free online resources. We engage with every possible property challenge for client organisations serving every human, animal and environmental need. Just in the last couple of years we have advised on light houses, an ice factory, a Quaker meeting house, a Victorian workhouse and a mediaeval gaol complete with stocks. Thankfully most clients are not in desperate straits and sensibly seek advice before their roof falls in or the bailiff arrives, but sadly we have had our fair share of those cases too.

Unfortunately the most vulnerable organisations are those with turnovers of less than 250K, which lack a staff with property responsibilities. This part of the sector often needs to take advice quickly, yet can too rarely afford it. Though of course bigger non-profits can come a cropper too and for the same reasons. These are in the main: poor governance – trustees who are not up to the job; poor or non-existent property management and budgeting; badly handled asset transfers which end up requiring far greater capacity, resources, and business skills originally envisaged. Plus the killer reason: basic ignorance. I never want to ever see a charity again with a three-year funding cycle turn up at our door with a 25 year lease. Don't smirk, it happens and you might even be funding it or its staff could be supporting a loved one.

And then there is location. No non-profit is an island, and yet it is because we are all crowded onto an urbanised island that property can be a nightmare for charities, however property savvy. If you are lucky or possibly unlucky enough to have premises in hot spots such as London and the South East, Leeds, Birmingham, Edinburgh, and Manchester, rents are rising fast. Increasing numbers of charities are being served notice to quit as landlords seek to improve old buildings to attract higher paying tenants.

As investors chase pockets of value, so rents rise fast even on the city fringes. Just how far

out of your city could your office be, if you are to retain your staff and serve your clients? Recently one of our clients serving an ethnic community in London and facing a 1,000 per cent rent rise, had to change their mem & arts because they had to move several miles east and therefore could no longer serve the community they were set up to serve.

As landlords seek to push up yields, leases are shorter - around five years - which offers greater flexibility for landlords and business tenants, but can represent a short term blight for charities which tend to grow more slowly.

Surveyor John Giblin of London-based surveyors Copping Joyce works closely with the Ethical Property Foundation as a member of our Register of Property Professionals. He says charities often have less awareness of local market conditions than commercial businesses and can be slow to act. "Yet if you are served with a notice to quit, you really can't afford to waste a moment."

"Leaving too little time to find alternative accommodation can have terrible consequences for your operations. With rents rising so fast, consider what cost saving measures you can take and seek professional advice.

"Bear in mind you'll need at least a month to find a new property - at least. Then two weeks for negotiation and four to six weeks for the solicitors to work through the lease. Then another month at least if there is a refit."

With change comes opportunity and many of the foundation's clients are now looking at more high density buildings - the days where charities spread themselves over several floors are going fast. Taking one floor not two saves a fortune in rent and management costs. Do we really need 150 sq. feet per desk? What about hot desking? Or co-location with another non-profit and sharing back office functions, providing even greater synergies and efficiencies.

However you serve and save the world, remember that as you will always need property to deliver your charitable purpose and it is a jungle out there - it really is the survival of the fittest. ■



**ANTONIA SWINSON IS CHIEF EXECUTIVE OF THE ETHICAL PROPERTY FOUNDATION, WHICH SUPPORTS CHARITIES AND COMMUNITY GROUPS WITH PROPERTY ADVICE**

[ethicalproperty.org.uk](http://ethicalproperty.org.uk)

It is estimated that there are more than half a million trustees in the UK, but popularity hardly makes it an easy job. Not only do trustees hold ultimate liability for a charity's actions, they must remain ever vigilant of the changing landscape in which their charity operates - be it

OnBoard - there are also a raft of umbrella bodies and non-profits offering training, networking events and guidance documents, too. These include NCVO, NAVCA, ACEVO, the Small Charities Coalition, the Association of Chairs and the FSI, to name a few.

don't think they would."

Others argue, however, that this wealth of resources fails to scale at a national level. "Some say there's a lot available for trustees, and if you live in London that might be your view," says Rebecca Weinberg, who is chair of St Gemma's Hospice in Leeds. Weinberg also helped to found ACEVO North, and currently leads the Yorkshire and Humber regional group of The Association of Chairs, an organisation established in 2013 to provide chairs with support and information.

"Outside London there are lots of publications and online resources, but not many events. And of course not all organisations can afford to send a trustee to London for an overnight stay."

## GOVERNANCE

# Sharing the load

**Trustees bear an enormous responsibility.**

**Where can they access the resources, support and guidance they need?**

WRITTEN BY CHARLOTTE SIMMONDS, A FREELANCE JOURNALIST

the influence of regulation, funding, or issues specific to their causal area.

With the sector under sizable pressure from the press, the public and their regulator to demonstrate accountability, it is arguable that trustees have never had it harder - but are they able to access the support, guidance and training they need to do their job?

Some experts say it is a case of information overload, not an information deficit. A Google search of "guidance for charity trustees in the UK", for instance, returns around 800,000 hits - while "training for charity trustees in the UK" returns more than 7.8 million.

While few would suggest that there are actually 8 million training providers to trawl through, it illustrates a picture that can be dizzying, particularly to those new to the sector, says governance expert Tesse Akpeki. Not only can trustees get training from private companies such as those she works through - Bates Wells Braithwaite and

"It's a big marketplace out there," says Akpeki. "When I started over 20 years ago, there was very little. But it has just grown and grown. The challenge is not about the amount, but about how and where to find it."

'Signposting' of information must be improved, she believes. "We need more strategic networking between umbrella groups, so that rather than having a thousand flowers blooming all over the place, we have a roadmap for how it links together. Lots of new trustees are curious and inquisitive, but the question is: would they know where to start? I

### The commission's role

It is widely accepted that the urtext of trustee governance is The Essential Trustee (CC3). The Charity Commission's core guidance document has recently undergone a makeover, with a new version released in early July following a sector consultation. The document is noteworthy for its hardening of tone. The previous CC3 took a warmer and more welcoming approach, opening with a note congratulating trustees on their appointment; whereas the new guide aspires to "make it clearer that [the Commission] expects trustees to comply with specified good practice unless they can justify not doing so".

## At a glance, the Charity Commission's guidance outlines that trustees must:

- Ensure the charity is carrying out its purposes for the public benefit
- Comply with your charity's governing document and the law
- Act in the charity's best interests
- Manage the charity's resources responsibly
- Act with reasonable care and skill
- Ensure the charity is accountable



Many credit this to the criticism leveled against the commission by the Public Accounts Committee in 2014, which called the regulator “not fit for purpose”. The commission says it has tried to strike a balance between a heavy hand and a helping hand.

“It’s an interesting dilemma,” says Neal Green, senior policy advisor. “A feeling that came out of the consultation on the new draft was that in using crisper, more direct language, we had lost some of the warmth. So we tried to emphasise that we know trustees do a difficult job. We want this to be a tool to help you do your best.”

He also raises the fact that, in the past, most trustees would have come to the CC3 in print form, whereas today most will be reading it online.

---

**BUILDING THE RIGHT  
SUPPORT NETWORKS WITHIN  
THE ORGANISATION IS JUST  
AS VALUABLE AS FINDING THE  
RIGHT EXTERNAL RESOURCES**

This has an impact on format, tone and language. “Writing for the web is about telling people plainly what to do, rather than talking around it. But of course when you make it more direct, it becomes more abrupt.”

Will more direct guidance help trustees to govern better? “I think the new document is very good; it’s where trustees should start,” says Akpeki, but agrees this new

language highlights the “paradigm shift” that many see taking place. “It is quite a different stance from the years when the commission was seen as more of a friend to the sector.”

**Peer support**

While the new CC3 remains the best thing to keep in your back pocket, guidance means more than having the right handbook. Trustees crave peer support in the areas they struggle, says Weinberg. “The problem with Charity Commission publications is that they aren’t very interactive, and having interaction is so important because a lot comes out in conversation.”

One of the key areas where trustees, and especially chairs, seek guidance is around building the right

# Trusteeship

relationship with their chief executive says Jenny Berry, ACEVO's head of leadership and ACEVO North.

"I have seen relationships where the chief exec and the chair will speak for 15 minutes before the start of a board meeting, right through to a chair and chief exec that speak every day. It's made me understand the importance of establishing what works for you," she says.

The best time to develop good governance relationships is when things are quiet, she adds, because it is when things go wrong that the strength of the board will be put to the test. Have a written process for crisis management agreed between the trustees and chief executive as a priority, she advises.

Does this include who should defend the organisation publicly? "There's no clear answer," Berry explains. "Sometimes the chief exec will go out in front, with the chair playing a supporting role. The strongest thing, though, is if the pair can send a message together. A strong relationship sends a strong message in a crisis."

## Look within

Her point underscores a wider truth about trusteeship - that building the right support networks within the organisation is just as valuable as finding the right external resources.

This is also important from a cost perspective, as "charities are likely to prioritise the work that they are doing rather than the [professional development of the] people who are running it," says Yasmin Batliwala, chair of drug and alcohol abuse charity WDP.

She adds that the makeup of boards is changing as the sector recruits more strategically, meaning trustees who are experts in a particular field - law, governance or finance, perhaps - may lack



**BUILDING THE RIGHT  
SUPPORT NETWORKS WITHIN  
THE ORGANISATION IS JUST  
AS VALUABLE AS FINDING THE  
RIGHT EXTERNAL RESOURCES**

knowledge of day-to-day operations.

"When I joined the organisation in the early years, people were invited to become trustees because they had experience of working around addiction," she explains. "They might have been social workers or probation officers. That has changed significantly. Now we have more professionals who are not as aware of the day-to-day issues, but who understand governance and share a passion for the cause. I imagine many organisations are experiencing the same."

In light of this, she reminds that the best people to upskill board members in cause-related issues are those within the organisation. "At WDP, if someone on the board said they lacked knowledge in a particularly area, such as residential rehabilitation, it would be very easy to do that in-house."

Weinberg agrees that it is the collective responsibility of the board to support each other in "bringing their role too life".

"Our job can be quite onerous, and some trustees find it hard to get their head around how an organisation really works, and what their responsibilities really mean," she says.

She echoes Batliwala in saying that one of the best places to turn for support is your colleagues, and suggests holding trustee development events to build these relationships.

"I started doing events at St Gemma's because somebody told us we were a group of skilled individuals that didn't work as a team," she says. "We had our first one over some supper and a glass of wine, and got a charity lawyer to talk to us about our legal duties. The most valuable thing is when people start asking questions, because questioning your role is what makes it real" ■

BOOK  
YOUR TABLE

# 2015 charitytimes Awards

Recognising leadership and professionalism

## SHORTLIST ANNOUNCED

SOLD OUT IN 2014 - EARLY BOOKING ADVISED



## The 16th Annual Charity Times Awards Gala Dinner & Ceremony 7 October 2015

NEW VENUE **Park Plaza, Westminster Bridge, London**

[www.charitytimes.com/awards](http://www.charitytimes.com/awards)



@CharityTAwards #CharityTimesAwards

Gold sponsor

**Deloitte.**

Sponsor

**Park Plaza**  
WESTMINSTER BRIDGE  
LONDON

In association with

**acevo**  
Charity Leaders Network

**CHARITY JOB**

**NCHO**

# 2015 charitytimes Awards

Recognising leadership and professionalism

## 16th Annual Charity Times Awards SHORTLIST ANNOUNCED!

### Congratulations to the finalists!

Since their inception the Charity Times Awards have continued to grow at a rapid rate. Publishing director Mark Evans said that the quality and volume of entries this year was impressive, and making the shortlist is an achievement in itself.

"This annual celebration places the spotlight on the hard work and achievements of the sector. Universally recognised as the pinnacle of success, the Charity Times Awards really are the measure of professionalism combined with passion. The record number of entries demonstrates that the sector is in good hands, and at a time when good news about charities seems in short supply winning this accolade not only recognises an outstanding contribution to the sector, but also demonstrates the sector's vital contribution to society and we look forward to celebrating that in October."

### SAVE THE DATE: 7 OCTOBER 2015

We look forward to announcing the winners at the Charity Times Awards Gala Dinner & Ceremony on the 7 October 2015 at a NEW VENUE! The Park Plaza Westminster Bridge, London. The event sold out last year so early booking is advised. Tables/seats can be booked at [www.charitytimes.com/awards](http://www.charitytimes.com/awards)

#### 2015 Shortlist:

**1. Charity of the Year: with an income of less than £1 million**

- CareTrade Charitable Trust
- The ClementJames Centre
- Coaches Across Continents
- Create
- Mosaic Clubhouse
- SeeSaw
- Shared Interest Foundation
- Shivia
- National Ugly Mugs Scheme
- Unseen

**2. Charity of the Year: with an income of £1million - £10million**

- Affinity Sutton Community Foundation
- The Albany
- Cool Earth
- Dame Kelly Holmes Trust
- IntoUniversity
- Rainbow Trust Children's Charity
- Teens & Toddlers

**3. Charity of the Year: with an income of more than £10million**

- Citizens Advice
- Football Foundation
- Langley House Trust



BOOK  
YOUR TABLE



- Leonard Cheshire Disability
- Teach First
- Samaritans

#### 4. Best New Charity

- Bounce Back Foundation
- GO! (Great Opportunities) Together
- Mane Chance Sanctuary
- Millie's Trust
- The Silver Line Helpline
- The Teapot Trust
- Youth United Foundation

#### 5. Outstanding Individual Achievement

- Dame Hilary Blume, Director, Knit for Peace
- Ken Dullaway, Active StreetGames Co-ordinator, StreetGames
- Les Heyhoe, Volunteer Fundraiser, KIDS
- Dame Esther Rantzen, Founder and President, The Silver Line Helpline
- Mohammad Saddique, Volunteer, Victim Support

#### 6. Rising CEO Star

- Suran Dickson, CEO, Diversity Role Models
- Francesca Findlater, CEO, Bounce Back Foundation
- Natasha Singarayer, CEO, The Abbeyfield Society
- Toby Staveley, CEO, Yellow Submarine
- Andrew Wallis, CEO, Unseen

#### 7. Fundraising Team of the Year

- Birmingham Children's Hospital Charity
- The Brain Tumour Charity
- Macmillan Cancer Support
- The Polly Parrot Appeal Fundraising Team
- Volunteer Fundraising Team – Cancer Research UK

#### 8. Charity Principal of the Year

- Caron Bradshaw, Chief Executive, Charity Finance Group
- Gillian Guy, Chief Executive, Citizen's Advice

- Claire Horton, Chief Executive, Battersea Dogs & Cats Home

#### 9. Campaigning Team of the Year

- The British Youth Council
- Cancer Research UK/Action on Smoking & Health
- Diabetes UK
- Muscular Dystrophy UK
- NSPCC
- Women's Aid

#### 10. Best Use of the Web

- healthtalk.org
- The National Autistic Society - Ask Autism
- Stroke Association
- Target Ovarian Cancer
- Victim Support
- Young Advisors

#### 11. PR Team of the Year: with an income of more than £10million

- Anchor
- Diabetes UK
- Electrical Safety First
- PDSA
- Save the Children
- WaterAid

#### 12. PR Team of the Year: with an income of less than £10 million

- Alcohol Concern
- Blind Children UK
- The Brain Tumour Charity
- Create
- London's Air Ambulance

#### 13. International Charity

- Ace Africa
- AfriKids
- Build Africa



# 2015 charitytimes Awards

Recognising leadership and professionalism

#### 14. HR Management Award

- Brook
- Leonard Cheshire Disability
- Rainbow Trust Children's Charity

#### 15. Financial Management Award

- Brook
- CHICKS

#### 16. Social Investment Initiative

- Career Connect
- Golden Lane Housing
- Key Fund

#### 17. Community Award

- Knit for Peace
- Missing People Charity
- Muscular Dystrophy UK
- Sova
- TimeBank

#### 18. Fundraising Technology Award

- iBid Events
- iStreet Giving
- London Air Ambulance/Rapidata Services Plc
- PayPal Giving Fund/eBay for Charity
- Village by Village

#### 19. Corporate Community Local Involvement

- AMAR International Charitable Foundation/Shell Iraq
- Community Links/Barclays
- Enfield Citizens Advice Bureau/Warburtons Bakery Enfield

#### 20. Corporate National Partnership Champion

- The British Heart Foundation/Asda
- The National Autistic Society/Axcis
- Prostate Cancer UK/Keyline

- Riders for Health/Dorna Sports – MotoGP
- The Sabre Charitable Trust/Tullow Oil Plc
- The Who Cares? Trust/HBAA

#### 21. Corporate National Partnership of the Year with a Retailer

- CLIC Sargent/Lidl
- Diabetes UK/Tesco
- Marie Curie/Superdrug
- The Prince's Trust/Asda
- Scottish Association for Mental Health/Jo Malone
- Sue Ryder/Morrisons

#### 22. Corporate National Partnership of the Year with a Financial Institution

- Cancer Research UK/Virgin Money
- Hospice UK/Clydesdale and Yorkshire Banks
- Parkinson's UK/Credit Suisse
- The Prince's Trust/Royal Bank of Scotland
- Save the Children UK/Prudential
- Unicef UK/Barclays

#### 23. Cross-sector Partnership of the Year

- Age UK/Zurich Community Trust
- The Dash Charity/Frimley Health NHS Foundation Trust
- London's Air Ambulance/Barts Health NHS Trust
- Macmillan Cancer Support/Coventry City Council
- National Osteoporosis Society/NHS
- The Prison Advice and Care Trust (Pact)/Public Prisons Wales

#### 24. Corporate Social Responsibility Project of the Year

- British Gas/Shelter
- Goldman Sachs/Greenhouse Sports
- KPMG/Living Wage Foundation, Citizens UK
- MBNA/Sale Sharks Community Trust
- O2- Telefónica UK Limited/National Youth Agency
- Yorkshire Building Society - Lasting Legacy Fund



BOOK  
YOUR TABLE



#### 25. Best Use of Technology

- Broadway Lodge
- Euan's Guide
- Royal Albert Hall & Samsung Electronics UK
- Samaritans
- SENSE
- The WESC Foundation

#### 26. Social Champion Award

- Caritas Anchor House
- Handmade Alliance C.I.C.

#### 27. Investment Management

- Cazenove Charities
- Newton Investment Management
- Quilter Cheviot
- Rathbones Investment Management Limited
- Sarasin & Partners LLP

- UBS Wealth Management

#### 28. Boutique Investment Management

- Cordea Savills – Charities Property Fund
- Heartwood Investment Management
- Impax Asset Management
- James Hambro & Partners
- Mayfair Capital
- Rothschild Wealth Management

#### 29. Consultancy of the Year

- Foster Denovo
- International Fundraising Consultancy
- PwC
- Sayer Vincent
- Tarnside Consulting
- TSP

Tweet us if you are a finalist!

The Charity Times Awards continue to be the pre-eminent celebration of best practice in the UK charity and not-for-profit sector. For the latest news and updates follow us @CharityTAwards #CharityTimesAwards

FOR FURTHER INFORMATION AND TO BOOK YOUR TABLE VISIT: [www.charitytimes.com/awards](http://www.charitytimes.com/awards)

#### For general event enquiries:

Hayley Kempen  
Head of Events  
+44 (0)20 7562 2414  
[hayley.kempen@charitytimes.com](mailto:hayley.kempen@charitytimes.com)

#### Media partners or marketing enquiries:

Sarah Whittington  
Marketing Manager  
+44 (0)20 7562 2426  
[sarah.whittington@charitytimes.com](mailto:sarah.whittington@charitytimes.com)

#### For judging/nomination enquiries:

Matthew Ritchie  
Editor  
+44 (0)20 7562 2411  
[matthew.ritchie@charitytimes.com](mailto:matthew.ritchie@charitytimes.com)

#### Sponsorship enquiries:

Sam Ridley  
Advertising Manager  
+44 (0)20 7562 4386  
[sam.ridley@charitytimes.com](mailto:sam.ridley@charitytimes.com)



CORPORATE PARTNERSHIPS

# Take the 'fund' out of fundraising

Jonathan Pelluet looks for the key to a successful corporate partnership

WRITTEN BY JONATHAN PELLUET, DIRECTOR OF FUNDRAISING, I CAN

As charity corporate partnerships change over time, so too do corporate fundraising programmes, rarely staying the same and often being at the mercy of the ebb and flow of internal and external factors beyond anyone's control.

Having recently joined I CAN – the children's communication charity as director of fundraising – I've been blown-away by the incredible track record of Charity of the Year partnerships (HBOS), multi-year collaborations that touched every aspect of the charity (BT and Open Reach) and new relationships that are so closely aligned with the charity's mission.

But – as with most charities who make the long-term commitment to invest time and resource in knocking on the corporate door of companies to ask for support - I CAN's corporate partnerships programme finds itself taking-stock, recognising the changes in itself, the sector and the competitive environment in which we operate.

Within the sector, you only need to look at the variety of departments who manage charity partnerships to understand the multitude of motivators that can drive companies to work with charities: CSR, HR,

marketing, executive, PR, public affairs.

And even amongst us fundraisers, it's not obvious where corporate fits. Why have one job title when you could have four: corporate fundraising/partnerships/development/account\* manager sitting in the corporate and community/major giving/volunteering/high value\* team. (\*delete as appropriate).

---

**AS COMPANIES GET SMARTER AND MORE DEMANDING OF THEIR CHARITY PARTNERS, CHARITIES ARE INVESTING MORE IN TRYING TO TAP IN TO THE POTENTIAL POT OF GOLD AT THE END OF THE RAINBOW**

As companies get smarter and more demanding of their charity partners, charities are investing more in trying to tap in to the potential pot of gold at the end of the rainbow.

But this all shouts loudly about the dynamism charities need to adopt when looking to grow a partnership or programme. And holding on to those most dynamic and valuable





partnerships you've built up over the years is the biggest goal of them all.

Partnerships themselves go through phases, reacting to key staff changes, the fluctuating fortunes of the company, and as interest wanes or fundraising fatigue sets in.

But strong stewardship, dynamism, flexibility and genuine understanding are essential for these partnerships to grow and evolve, as I've often seen during my time at FareShare and Revitalise. If the focus is just on cash and lacks substance from an early stage, then the partnerships will come to a quiet end. If the commitment and skills to engage corporate partners are there, only then can real impact and innovation take hold and turn it into something really special that genuinely brings benefits to all.

Corporate volunteering is still at the heart of many charity partnerships. But long gone are the days when a 'community day' at a charity was an easy time out of the office; when the volunteers could afford to have a big night out the evening before, thinking ahead lay a day to kick back and relax. And rightly so. While fun should always be at the heart of the volunteering experience, team volunteer days are usually hard work; they can sometimes be very moving, and they can often expose those who volunteer to a side of life that might otherwise be hidden or even ignored.

At the same time, corporate volunteers can (often literally) smell a mile away those volunteer 'experiences' where the same room is painted again and again to be able to offer a 'worthwhile' team building exercise. But who can blame charities for trying their hardest to engage companies when at stake are such big potential rewards (little consolation though for those charities that can't offer them at all).

Hands-on opportunities for the

staff of a company to make a real and genuine contribution have to be sewn into the fabric of the organisation. When they are real, they make a real connection for those involved with those the charity supports, and sow the seeds for a true partnership that reaches across the business.

In all cases, it is essential

---

## LONG GONE ARE THE DAYS WHEN A 'COMMUNITY DAY' AT A CHARITY WAS AN EASY TIME OUT OF THE OFFICE

volunteers leave in no doubt of the importance of the role they played, and be much richer for the experience.

Proving the internal case for investing such effort and manpower in some corporate partnerships can be even harder where the 'cash-prize' is not clearly in sight; where long-term commitment to cultivation, stewardship and embedding the relationship is needed to build a partnership that lasts. And these are the partnerships that can often have the biggest positive impact on those the charity supports.

As we enter the season of 'Charity Of The Year' selections, with it comes the annual – and completely justified – rush of blood to the head of the executive team or board when the six or seven figure funding pot are mentioned. But even these 'high-risk/high-return' bids seem to be slowly changing with the times to better meet the needs of both charity and the company, changing in some cases to the awkwardly worded 'Two Year Charity Of The Year Partnership', with companies recognising the fact that by the time a one year partnership has started, it's already time to plan the closing

ceremony.

With many companies, charities need to tap into all of their resources and lay bare their wares: from the compelling emotive strap-line and well-presented imagery of 'beneficiaries' through to detailed reporting of outputs and outcomes. From demonstrating what the impact of £1 will deliver through to engaging hundreds of their staff across the UK through Team Volunteer Days.

New milestones of success are also creeping in: access to new markets, numbers of 'click-throughs', 'opportunities to see'. Companies are keen to get the competitive edge and charity partnerships help.

Building that long-lasting partnership requires hard work to nurture a relationship where both parties meet the needs of the beneficiaries. By encouraging the company to care as much as you do about what you do and how you do it, we can live in hope of a successful and lucrative partnership.

We all know we have to kiss a lot of frogs to find the prince(ss). Mining the contacts of your board, colleagues, friends and family will get you part way there. But when the charity and company are genuinely aligned - when their activity, mission and values are shared - they can have a deep and profound legacy on the charity for years to come.

I CAN saw this with BT and Openreach which was a fantastic association that lasted a decade and transformed the charity at a crucial time.

My goal is to continue driving this momentum and launch I CAN into an era of new successful corporate partnerships that moves us closer to achieving our mission which is that no child should be left out or left behind because of a difficulty speaking or understanding ■

# SAVE THE DATE



**12 May 2016**

**Millennium Hotel, Mayfair, London**



**For further information about entering or attending the awards in 2016, please contact:**  
Hayley Kempen, Head of Events, +44 (0)20 7562 2414, [hayley.kempen@charitytimes.com](mailto:hayley.kempen@charitytimes.com)

DIGITAL ENGAGEMENT

# The personal touch

**Online channels are increasingly important for the third sector. Charity Times finds that while the medium might change, the benefits of keeping things personal remain as important as ever**

WRITTEN BY ANTONY SAVVAS, A FREELANCE JOURNALIST

**W**hile traditional forms of contact such as direct mail, telephone and face-to-face remain the backbone of charities' communication with stakeholders, it is more important than ever for charities to understand the best way to engage with their donors in the new digital world.

Charities need to know what to do differently in order to tailor their messages for use online compared to more traditional channels. Generally, they have to customise communications for maximum effect when using what can basically be a broad and impersonal medium.

## Getting a grip

Needing to get a grip on the online side of things is illustrated by the many digital opportunities out there, such as the new Storm ethical search engine, which allows consumers to raise money for their favourite charities as they shop online.

Storm shares commissions on purchases made via its 'Give' icon displayed alongside listings for participating retailers on search results pages. WellChild, the national charity for sick children whose patron is Prince Harry, is already on board with the service. Storm reckons it could eventually raise £200 million for UK charities each year.

## Getting it right

Stephen Lee, Professor for voluntary sector management at the Cass Centre for Charity Effectiveness at Cass Business School, says: "Given the multitude of traditional and online channels available, there is a major opportunity for charities to engage new and existing stakeholders, but as with any communication there are risks.

"Before embarking on any digital campaign, organisations need to take a step back and develop a proper strategic plan."

He says the plan should include



details about the purpose of the communication - what it aims to achieve, who is being targeted, how it will be measured and what is the most appropriate channel to use.

"To resonate with people, a good digital communication must be interactive, but the challenge for charities is being able to respond quickly to people and then to look after the new relationships created," says Lee. "There is nothing worse than an organisation using an online communication to engage people, promising something and not following through."

Lee warns however that digital communication might not always be the best medium to use. "Sometimes there can be pressure for everyone to be doing everything digitally, but this pressure can often come from consultants who make their living selling digital services."

He warns: "It all comes back to the planning and if in any doubt, don't do it."

## Stop the hounding

Jason Lark is managing director at Celerity Information Services. The company works with charities including Marie Curie, CRUK, National Trust and Oxfam, helping them to improve donor relations and generate more revenue from donor data.

Lark says: "The key is to stop online communications - and any other marketing for that matter - from being a broad and impersonal medium. Charities are lucky to have loyal supporters that aren't adverse to frequent communications, but no-one wants to be hounded."

He says online supporters should be offered preference setting options on sign-up and asked to confirm their contact preferences with a follow-up email. "It's more important than ever that brands ditch

the mass email campaigns and instead focus on targeted online communications,” Lark says.

### Digital personas

In recent research, Advanced NFP (part of Advanced Business Solutions) looked at “digital personas”, the demographics of a donor or supporter when online in their various guises, whether on LinkedIn at work or Facebook at home with friends, for instance.

Advanced NFP’s commissioned research involved 350 charities and not-for-profit organisations, and considered whether charities are recognising the opportunity with digital personas.

The research showed that whilst the majority claimed to understand the concept of a digital persona and that 78 percent of organisations recognised they should be doing more to build individual profiles of their supporters, most admitted they aren’t doing anything to understand them better and are predominantly relying on direct interactions to build profiles.

Simon Fowler, managing director of Advanced Business Solutions, says: “With statistics showing that consumers are increasingly shopping online and mobile banking recently taking over as the preferred route, it seems logical that charity giving is set to follow suit – text and mobile giving are two of the fastest growing areas.

“The only problem is, with the contact explosion of social channels and one person having potentially several different personas – from their work email through to purchasing on Amazon - charities must appeal to and interact effectively with them all.”

### Tracking the donors

Data intelligence agency REaD Group has partnered with Macmillan

Despite the obstacles to a successful digital strategy, Hannah Attenburrow, marketing officer at UK children’s charity Dreams Come True, told *Charity Times* the organisation is effectively using a small budget to make the most of social media.

The charity aims to fulfil as many dreams as possible for children and young people with life limiting illnesses. Attenburrow says: “The digital era has given us an extremely cost effective method to enable us to communicate with our stakeholders in a timely, personalised way and most importantly at a time when they want to interact with us.

“To do this we primarily use social media to engage with our fundraisers and key stakeholders. The most effective method we believe is to have an integrated digital approach where our social channels are used alongside our blog and PR to inform and celebrate what the charity and our fundraisers have been up to.”

Charity ambassadors are also used to drive engagement. During Dream Tea Week, the charity’s annual fundraising campaign where supporters host afternoon teas and donate proceeds to Dreams Come True, the charity worked with celebrity baker Miranda Gore Browne to host a “Twitter takeover” where people asked her baking questions.

This increased engagement with existing followers but also attracted new users to the organisation’s social pages. As not everyone has a Twitter account, the charity also allowed people to email their questions in too. All the answers were posted on the organisation’s blog which had the added benefit of driving traffic to the website.

“Charities also shouldn’t forget about Facebook advertising,” Attenburrow says. “Used in the right way it can be a key part of referral marketing campaigns and can increase the number of referrals as well as online engagement. It is a brilliant resource for charities as the budget can be set accordingly to the campaign, and it’s easy to monitor and tweak in line with what your trying to achieve.”

## THE KEY IS TO STOP ONLINE COMMUNICATIONS - AND ANY OTHER MARKETING FOR THAT MATTER - FROM BEING A BROAD AND IMPERSONAL MEDIUM

Cancer Support and Maggie’s Cancer Caring Centres to develop data marketing technology.

Scott Logie, managing director of REaD Group Insight, says: “Data specialists don’t consider online and offline as two separate channels, they focus on the individual. The tricky part of communicating with people in the virtual world is that we

can only use information they’ve chosen to share with us, information that is often not enough to effectively market to them.

“The way to solve this is to create links between the online and offline world, so that offline information can contribute its demographic detail to online behavioural information, building a digital persona of each recipient.”

Logie says charities should explore how direct distribution campaigns, such as door drops or email, can be supplemented with online targeting. In the same way an advert can be posted through a person’s letterbox or arrive in their inbox, it can also appear on their favourite website, or be targeted at them and

## The internet and digital engagement opportunities

### Google Ad Grants

Google Ad Grants is the non-profit edition of Google's online advertising tool AdWords. This grant allows charities to advertise on Google search results pages for free. Charities have \$10,000 per month to spend on ad clicks, with a maximum cost-per-click of \$2.

### RLSAs

Remarketing Lists for Search Ads (RLSAs) is an option within the Google Ad Grant account. Customised text ads can be shown within Google search result pages, to people who have previously visited your website. If a user visits your site without donating for example, you can target those people while they search on Google to help encourage them back to the website and donate.

### Ad Extensions

Google Ad Grants allow ad extensions, such as Sitelinks, location extensions and Call extensions, to be included in search adverts. These can help drive more traffic to your website, allow local people to find your charity and encourage people to get in touch.

### YouTube Non-profit

The YouTube Non-profit Programme offers charities the chance to engage with YouTube users by showcasing charity missions, fundraising events or success stories. A Google Wallet "Donate" button can be added to your video.

### Google Display Network

Charities can also make use of display advertising on the Google Display Network (GDN). Banners, text ads and click-to-play video ads can be used to target visitors on related

websites or users who have relevant interests.

### Search Engine Optimisation (SEO)

SEO enables charities to be found online by helping them "rank" on search engine results pages for particular search terms. Think "clean water Africa" or "child poverty UK" – if your site ranks for these terms, you'll be the first thing people see when they type them into Google.

### Content marketing

Content marketing goes hand in hand with SEO – it's another means of getting your charity, and its message seen online. Content marketing is the creation and distribution of valuable, relevant and consistent content (such as blog posts, videos or games) in order to attract a clearly-defined audience and drive a particular action.

One of the best recent examples of a content-driven charity marketing campaign is the "one second a day" video produced by Save the Children, which showed viewers what an average English girl's life would look like if London experienced a conflict similar to that taking place in Syria – the video has had approaching 50 million views.

### Social media

Social media gives you a direct channel of communication with your supporters, but the thing to remember with social media is that it's a two-way conversation. Keep your followers up to date with what you're doing, share photos, stay relevant and provide them with content that they're likely to find interesting.

Once you've done this, you've got a captive audience when the time comes to ask them to donate or to help you spread your charity's message.

Source: Liberty Marketing

similar individuals through Facebook or other social sites.

This tactic can be achieved by building connections between personal information (such as address or email) and cookie data from devices after permission is given by individuals. This connects persona and demographic information with behavioural data.

### User-generated content

Andy Mallinson, European

managing director of Stackla, a social content curation platform, says: "Social media holds huge potential for charities when it comes to driving customer engagement and donations. When an individual makes a donation or supports a cause, they often share this on social media, perhaps via an Instagram photo or a Tweet.

"This user-generated content (UGC) should be harnessed and amplified by the charities

themselves. After all, people tend to implicitly trust insight from peers, much more so than material they receive from brands."

He says charities can incorporate UGC within "dynamic re-marketing advertising". When would-be donors are browsing online, they can be served-up dynamic socially-powered ads from that particular charity, with the ability to click-through and donate ■



# charitytimes

Charity Times magazine is also available as an e-edition for tablets (iPad and Android devices), and can also be read on a PC.

The interactive digital format allows readers to easily search, browse and navigate the latest news stories, in-depth analysis, features, commentary and even adverts.

All content is hyperlinked for a richer online experience.

Through the print magazine, website, Twitter, videos and now the digital edition, *Charity Times* ensures that you always receive the latest news from the charity sector, in the most convenient format for you.

To sign up, visit [www.charitytimes.com](http://www.charitytimes.com)

## In their own words...

Sector personalities' comments on the topics affecting the charity space

---

### On new figures showing charities are not sharing in the economic recovery

"Many charities have demonstrated considerable success in growing their earned income from individuals, and we should celebrate this. But we also have to remember that charging fees for services is by no means a practical or sustainable option for all. Quite simply, cuts to public service contracts mean that charities can do less for those they exist to support."

NCVO chief executive Sir  
Stuart Etherington

---

### On grant making

"It is encouraging to see that despite the financial crisis and recent recession, the total actual value of grants is returning to pre-recession levels. However, the finances of grant-making trusts and foundations are likely to come under more pressure as further cuts in public spending are implemented. The knock-on effect of cuts in statutory funding may force foundations to re-evaluate their strategic priorities and how they support their beneficiaries in the future"

DSC head of research Tom Traynor

*"To navigate the next five years, charities will need to show considerable financial leadership, investing time and resources in understanding their business models and identifying risks and opportunities."*

CFG chief executive  
Caron Bradshaw



---

### On fundraising

#### KEVIN TAYLOR

Storm CEO

"The UK is one of the world's most generous nations but increasingly aggressive tactics are threatening to create a 'donation deficit' where the amount we donate to charity actually decreases. Consumers are saying they want easy, non-intrusive ways to incorporate charitable giving into their everyday lives."

#### ADRIAN SARGEANT

Director, Centre for Sustainable Philanthropy at Plymouth University

"The level of government interest in our sector has never been higher, so this must be the time to push for and achieve meaningful change that would benefit fundraisers, charities and the public alike. At the very least as a profession we should have a vision for the system of self-regulation we would like to see and a strategy for how exactly we are going to achieve it."



*“The government thought it was the right thing to do to give this charity one last chance of restructuring to try and make sure it could continue its excellent work.”*

**Prime Minister David Cameron**

## On Kids Company

**SIR STEPHEN BUBB**

**ACEVO chief executive**

“As council social care is cut to the bone, Kids Company was a major player in town. The social consequences of their demise are catastrophic for the individuals concerned and costly to the exchequer. Yet it would compound the catastrophe if criticism of the decisions by government on the funding of Kids Company caused government ministers to micromanage charities with which they work, or out of fear, overlook them altogether.”

**CAMILA BATMANGHELIDJH**

**Kids Company founder**

“That’s it, it’s the end of Kids Company. And actually a bunch of rumour-mongering civil servants, ill ... spirited ministers, and the media on the back of a range of rumours, put the nail in this organisation and shut it”



## On the first Big Society Capital investment to pay back

**NICK O'DONOHUE**

**BSC CEO**

“This is the first Big Society Capital investment to be repaid and illustrates how charities and social enterprises can successfully use social investment as a tool to generate additional funding and increase their impact.”

**PETER CROWNE**

**Scope director of finance**

“We have watched the social investment market grow over the last few years and it is great that we can tell the story of what it has achieved and that we have paid it back.”

## On the lobbying act

“Charities and community groups play an important role in getting people involved in civic action and local democracy. I’m not sure what examples there are of charities unduly influencing elections but they must be so rare they could be dealt with individually rather than this blanket legislation.”

**NAVCA head of public affairs Barney Mynott**

# charitytimes

FIRST CHOICE FOR NON-PROFIT MANAGEMENT

## Subscription order form

Name :	
Job Title :	
Company Name :	
Address :	
Post Code :	
Type of Business :	
Phone :	Fax :

Please tick box and complete details as appropriate  
I enclose a cheque, payable to **Charity Times** for:

- £79.00 (Reg charity)     £119.00 (UK)  
 £132.00 (Rest of world)

Please debit my Access/Visa/Mastercard

Card Number :	
Expiry Date :	
Signature :	Date :

Please return the form, together with your payment to:  
**Circulation Department, Charity Times**  
**Sixth Floor, 3 London Wall Buildings**  
**London EC2M 5PD**

**Email:** [joel.whitefoot@perspectivepublishing.com](mailto:joel.whitefoot@perspectivepublishing.com)  
**Telephone:** +44 20 7562 2420  
**Fax:** +44 20 7374 2703

Charity Times is a leading management magazine for UK charity professionals. Each edition provides in-depth features, breaking news, market surveys and profiles of industry figures. Among the issues tackled are fundraising, information technology, recruitment, law, investment and banking.

Subscriptions to Charity Times cost just £119 per annum (£79 for registered charities). If you wish to receive the magazine, simply complete the form, or call us on the number below.



LEGAL COMMENT

# Legal comment: Kids Company

## Two sides of the coin and the changing landscape of the charity sector

WRITTEN BY SARA SAYER, DISPUTE RESOLVER AND HEAD OF  
THE CHARITIES TEAM AT BIRKETTS LLP

The travails of Kids Company and the associated media maelstrom over recent weeks serves to illustrate how the charity sector has changed over recent years.

Whilst the real story about Kids Company is yet to be known (as both sides strongly advocate their opposing positions), it highlights a perennial tension for charities. Be criticised for spending too much money on administration and not on the service users/beneficiaries, or for spending too much money on service users/beneficiaries and not enough on administration. The latter being an allegation levelled against Kids Company.

On the one hand - you have the camp that advance the bravery of a founder prepared to stand up to the Government's funding cuts. To others it is a textbook case of many of the concerns encountered in the modern-day charity setting. These include 'founder's syndrome' - someone who loses the ability to stand back and view things objectively; perhaps unable to cut the apron strings as the bird fledges and wants to leave the nest and explore new territories. In Kids

Company's case, the founder appeared to admit on Radio 4 that the charity did not have any reserves and lived hand to mouth, seemingly relying on "cups of tea" with stakeholders and potential funders - all of which for a charity that size was unsustainable. Strong financial planning and securing income streams should have been a core part of its strategy and operations.

---

### CHARITIES ARE SIMULTANEOUSLY EXPERIENCING BOTH FUNDING CHALLENGES AND GREATER COMPETITION AS THEY BID AGAINST EACH OTHER FOR FUNDING AND CONTRACTS

Many mainstream charities have significant incomes, even comparable to large corporates that need managing in a business-like and efficient way. Gone are the days of a CEO being entitled to say their organisation does not have a

strategic business plan because it is a 'charity'. Moreover, the senior management team and board should expect scrutiny of their actions and be in a position to justify those actions, especially if in receipt of public money. Those charities with a unilateral "board knows best" mentality may struggle; successful charities are those that engage with their stakeholders and think about issues from different perspectives. User and, indeed, non-user surveys need to be more commonplace. Risk management needs to permeate all aspects of a charity's strategy and operations.

### The changing landscape of the charity sector

**Sector** - The boundaries between Government, the private sector and the voluntary sector are increasingly blurred. The charity sector has grown, due to less state provision and the promotion of the "Big Society". Charities are simultaneously experiencing both funding challenges and greater competition as they bid against each other for funding and contracts and as charities both commission and procure to deliver services. Contracts demand more for less or, at least, more for the same money.

**Beneficiaries** - Beneficiaries are on the sharp end of realising there is less state provision. Society's demographics constantly evolve; we have a greater number of older people, we are more disparately distributed and the older generations tend to live distances from families and traditional support structures. Studies evidence the epidemic of loneliness plaguing all ages but especially the elderly - hence the emergence of charities such as Silver Line.

# Comment

## Supporters and donors -

Individuals are giving differently. While individual donations are increasing, there is also a shift from “cash to kind” - people giving resource more than money. In addition to the altruism of old, is the concept of an “exchange relationship” where the donor receives something in return. On an individual level, the millennial generation are lending and not just giving time and money. On an institutional and corporate level, we have seen the advent of the corporate social responsibility culture, through to the materialisation of social impact and the measuring of outcomes and KPIs. The way supporters give their time is also changing. People may give shorter and less regular amounts of time through formal programmes such as Timebank or via informal ‘pop up’ giving mechanisms, such as, Twitter campaigns.

**Structure and operations -** The sector has changed on a number of fronts. There is now an emphasis on early intervention and the targeting of resource to influence lifestyles and behaviours to avert the onset of illness or disease.

Formal structures and institutional relationships can be bypassed. The disruptive power of the internet and social media means that there is now a 24/7 media landscape with the consequent increased scrutiny to be managed. Two-way dialogue means that the charity does not have the last word, but needs to respond to comments and interact with people who have elected to engage with it.

Internet campaigns run by 38 Degrees deluge MP’s offices with automated emails but these still need answering! Petition sites can have a mass impact, including Care2 which garnered more than a million global signatures in under a week influencing Zimbabwe’s (seemingly



temporary) decision to suspend hunting around its biggest game reserve after the slaughter of Cecil the Lion.

The internet easily facilitates crowd funding. This is being used for funding medical treatments, social enterprise, stand-up comics at the Edinburgh fringe and community challenges to planning decisions to name a few examples.

**Regulation** - At a time when there is a societal urge and imperative to do things differently, the traditional source of guidance and friend to the sector, the Charity Commission, has seen its funding cut significantly. Accordingly, the Charity Commission has had to restructure and has moved from being a friend, to what the CEO Paula Sussex describes as an ‘enabler’. Others would say it is more of an enforcer and regulator. The Charity Commission admits a renewed emphasis on compliance, including a role to deal with mismanagement, and monitoring of charities, in a period when trust issues have come to the fore. Trust and conduct rose to the top of the media agenda in the wake of the death of the fundraiser Olive Cooke and the ensuing investigations into fundraising practices. When coupled with the unmasking of abuse by some of charitable status the charity sector can be said to be experiencing one of its toughest tests in public confidence.

**Trustees** - The Charity Commission has also focused on getting charity trustees in better shape. It has encouraged a move away from “pale, male and (some would say) stale” trustees, to a board that reflects the diversity of a charity’s service users and beneficiaries. Ideally it would include some of the latter on the board. A skills and cultural change amongst charity trustees is advocated so that boards

---

## EVERYTHING A CHARITY DOES SHOULD COME BACK TO WHETHER IT FULFILS THE CHARITY’S OBJECTS: THE VERY REASON WHY IT EXISTS

cover the various disciplines necessary for strong governance. These range from HR, to legal, fundraising, finance, to marketing and business development.

This helps with the commission’s desire to “enable” trustees so that they perform a role of scrutiny, imbued with a mind-set of challenge and ideas. Trustees should not be there simply to just rubber stamp the decisions of a charity’s management team. This change of approach, arguably, helps to counterbalance the commission’s loss of resource and may also be construed as a manifestation of the Big Society in action; the empowering of communities and self-regulation.

At the same time, conflicts of interest (a recurring theme in Charity Commission case reports) are on the agenda. Conflicting interests are not necessarily eliminated but, instead, are registered and dealt with in a far more transparent and accountable way than in the past.

Overall, charity trustees should be the stewards of the charity, focusing on strategic issues rather than operational concerns (on which the staff should lead), to help charities survive choppy waters and be in better shape for the future.

### Lessons

A long hard look needs to be taken at the Kids Company case to see what lessons can be learned. Governance issues, strategic and financial plans and the viability and

transparency of those plans need to be examined including in the context of the role of charity trustees.

Everything a charity does should come back to whether it fulfils the charity’s objects: the very reason why it exists. An assessment should be carried out as to whether a proposed decision/action makes life better for the charity’s service users and beneficiaries. This requires a sound strategic and financial plan to ensure that the charity survives and prospers, to provide for its beneficiaries and service users, both now and in the future.

Finally, let’s not lose sight of the fact that a huge number of people are doing good work in the charitable sector; paid and unpaid. As the American anthropologist Margaret Mead said in the 1960s: “Never doubt that a small group of thoughtful, committed citizens can change the world; indeed it’s the only thing that ever has”. Giving it the benefit of the doubt, Kids Company, as its name implies, was set up for the kids. Its founder argues that it served a purpose and bridged the gap between state provision and user need at a time when support was required more than ever. Now charities and other services are going to have to step in and plug the gaps unless service users are to be just left to fend for themselves. The situation could, perhaps, have been managed earlier by the adoption of more efficient business and financial practices. Potentially, greater collaboration with like-minded organisations could have resulted in the use of shared services, thereby reducing costs. Such an approach is not at the expense of, but for the benefit of, the children. This is because it may mean a charity remains sustainable while providing a structure through which immediate problems can be addressed ■

# charitytimes

FIRST CHOICE FOR NON-PROFIT MANAGEMENT

## ROUNDTABLE EVENTS WITH CHARITY TIMES

**C**harity Times hosts a series of individually sponsored roundtables at the discretion of participating sponsor companies.

The topics under discussion will be set according to specific areas of importance to the respective sponsor company.

Participation in this in-depth discussion will present your speakers and company as market-leaders in your chosen area to our readership of over 8,500 Senior Managers and Directors in the UK Charity & Not-For-Profit sector. The roundtable event will be written up as an extended feature in CharityTimes which will include your company branding on each page.

The independently chaired evening or afternoon discussion will include approximately 6-7 individually selected high level delegates from organisations relevant to your chosen topic area with your feedback and input. These delegates will be experts in the subject from medium to large UK charities. The high level of knowledge will show your company to be a true thought leader in the sector.

The evening/lunch will begin with networking drinks at 12 or 6pm and the discussion itself will begin at 12:30 or 6.30pm and last for around 90

minutes. This is then followed by a three course dinner and drinks for all participants as a less formal networking opportunity.

The full sponsorship package available to you includes the following:

- Two of your chosen delegates on the discussion panel
- Charity Times to invite delegates while working closely with you to ensure a highly relevant and expert panel on the day
- The opportunity to shape the agenda to be discussed at the event with the independent Chairperson
- Panelist profile in Charity Times magazine
- Company logo on every page of the six-page review in Charity Times magazine
- A full dinner and refreshments at the event
- Extensive branding in promotion of the event
- Your branded PDF available for download on the web page for 1 year
- You will retain the PDF of the 6 page branded feature to use as you wish in your own promotion

We use a selection of prestigious venues in London to host these events such as The Gherkin or Tower 42. We can host these events in other locations around the UK and the price quote would be individually quoted according to location.

Sponsoring this event is a great opportunity to promote your services, products and expertise to senior-level executives in your target market and to your fellow suppliers, while gaining further access to our extremely relevant circulation.

Bespoke package available on request



For further information please contact

Sam Ridley on +44 (0)20 7562 4386 or [sam.ridley@charitytimes.com](mailto:sam.ridley@charitytimes.com)

# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## ACCOUNTANTS AND AUDITORS



### Baker Tilly

Nick Sladden  
National Head of Charities  
25 Farringdon Street  
London, EC4A 4AB  
T: +44 (0)20 3201 8313  
E: nick.sladden@bakertilly.co.uk  
W: www.bakertilly.co.uk

### Your charity. Our focus.

#### Supporting your aims is our business

Audits don't have to be onerous and our approach is to assess the size and complexity of your charity before we begin auditing – we want to know what makes our charity clients tick, not just ticking the boxes. With teams throughout the UK and a full range of advisory services on offer, we are able to deliver innovative and sector leading solutions to our diverse portfolio of clients, wherever you are based.

## ASSOCIATIONS



### ACEVO

1 New Oxford Street  
London  
WC1A 1NU  
T: +44 (0) 20 7280 4960  
F: +44 (0) 20 7280 4989  
E: info@acevo.org.uk

The Association of Chief Executives of Voluntary Organisations (ACEVO) supports members by providing access to:

- Third sector leadership and governance resources to support boards and senior management teams
- Information, publications and reports on key third sector issues
- Conferences, courses and networking opportunities to enhance skills and build knowledge
- Dedicated helplines and support services such as CEO in Crisis - a service for third sector CEOs facing disputes with their board.

ACEVO also acts on behalf of members; connecting members to key contacts in government.



### Charity Finance Group

15-18 White Lion Street  
London  
N1 9PG  
T: 0845 345 3192  
F: 0845 345 3193  
Company Registration No. 3182826  
Charity Registration No. 1054914

Charity Finance Group (CFG) is the charity that champions best practice in finance management in the charity and voluntary sector. Our vision is of a financially confident, dynamic and trustworthy charity sector. With this aim in sight, CFG delivers services to its charity members and the sector at large which enable those with financial responsibility to develop and adopt best practice.

With more than 1,300 member charities, managing over £19.3 billion, we are uniquely placed to challenge regulation which threatens the effective use of charity funds, drive efficiency and help charities to make the most out of their money.

For more information please visit [www.cfg.org.uk](http://www.cfg.org.uk)



### Institute of Fundraising

Charter House  
13-15 Carteret Street  
London SW1H 9DJ  
T: +44 (0) 20 7840 1000  
Twitter: @ioftweets  
Facebook: [www.facebook.com/instituteoffundraising](http://www.facebook.com/instituteoffundraising)  
[www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)

The **Institute of Fundraising (IoF)** is the professional membership body for UK fundraising and is the largest individual representative body in the voluntary sector. We enable fundraisers to be the best they can be.

**Our vision:** Excellent fundraising for a better world

**Our mission:** Creating the environment and understanding for fundraisers to excel

We support fundraisers through representation, standards-setting and professional development' and we champion and promote fundraising as a career choice.

We support members and the wider fundraising community to reach their potential through:

- Setting the standards through the Code of Fundraising Practice
- Professional qualifications, training & events
- National, Regional and Special Interest Groups

**Find out how we can enable you to be the best fundraiser you can be.**

## BANKING



### The Charity Bank Limited

Fosse House, 182 High Street  
Tonbridge  
Kent TN9 1BE  
T: 01732 441919  
E: [enquiries@charitybank.org](mailto:enquiries@charitybank.org)  
W: [charitybank.org](http://charitybank.org)  
Twitter: @charitybank  
Facebook: [facebook.com/charitybank](https://www.facebook.com/charitybank)

If you could borrow from a bank run for charities and social enterprises and owned by charities and social purpose organisations, would you be interested?

Charity Bank exists to lend to organisations with charitable goals and every single one of our shareholders is either a charitable trust or foundation, or a social purpose organisation: our mission is to support your mission.

We offer loans to support your organisation, a deep interest in what you do and a team of regional managers that is there to be your partner in doing good.

Talk to our lending team to enquire about a loan:

T: 01732 441919

E: [enquiries@charitybank.org](mailto:enquiries@charitybank.org)

# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## BANKING



### Unity Trust Bank plc

Nine Brindleyplace  
Birmingham  
B1 2HB

T: 0345 140 1000  
E: us@unity.co.uk

Looking for a bank that **understands** your charity?

Unity Trust Bank was rated No.1 for Sector Knowledge in an independent charity banking survey (2014) and was also rated top for Relationship Managers, Fees and Charges and Meeting Expectations.

Currently, around 7,000 charities bank with Unity and over 50% of our lending last year was to charitable organisations.

Established in 1984, positive social impact and financial sustainability were part of our founding principles. Today, more than 30 years later, they remain core to what we stand for.

If you're a charity, look no further – **we're on the same page.**

## CHARITY MARKETING



### graffiti media group

The Barn  
Bury Road, Thetford  
East Anglia  
IP31 1HG

T: 01842 760075  
F: 01842 339501

E: bestdata@gmgroup.uk.com  
W: gmgroup.uk.com

### the modern art of no fuss, donor acquisition

lead generation | data | media | creativePR

Specialising in the charity sector, we offer a portfolio of products and services to help charities maximise a return from their investment in donor acquisition marketing and call centre services.

- data procurement and planning
- charity specific telephone lead generation
- customer and campaign management
- media buying
- call centre services

A team of the industry's best planners and strategists with open, honest, ethics and knowledgeable market expertise. Together we'll build robust, consistent response rates.

## INSURANCE



### Ecclesiastical Insurance Office

Beaufort House  
Brunswick Road  
Gloucester GL1 1JZ

Visit our website or talk to your broker to find out more.

T: 0845 850 0307  
E: information@ecclesiastical.com  
W: www.ecclesiastical.com/CTimes

At Ecclesiastical, we've been insuring not for profit organisations for 125 years. Today, we insure thousands of the nation's charities of all sizes and complexities.

Voted best charity insurer\* for the last five years running by both charities and brokers, we've worked closely with both to develop a flexible, specialist product that meets the varying needs of different types of charities.

We also offer a complete package of guidance and advice that's there to give you support when you need it.

**Speak to your broker for more information or visit [www.ecclesiastical.com/CTimes](http://www.ecclesiastical.com/CTimes)**

\* In research conducted by FWD, an independent market research company, of those brokers and organisations who named an insurer in the survey, the majority voted Ecclesiastical as the best insurer for charity



### Bluefin

Cutlers Exchange  
123 Houndsditch  
London  
EC3A 7BU

T: 01474 537777  
E: enquiries@bluefingroup.co.uk  
W: bluefingroup.co.uk/charity-insurance

Our team of charity insurance experts have been providing market leading solutions to thousands of clients, including some of the UK's leading charities, for over 40 years.

Whether you're a welfare establishment or in the education sector, museums or the arts through to village halls, we've used our breadth and depth of understanding to develop specialist products and services.

Our clients enjoy quality service from people who are experts in their field and we're able to provide insurance and risk management solutions for charities regardless of their size or complexity.

### Markel (UK) Limited

Verity House  
6 Canal Wharf  
Leeds LS11 5BQ

T: 0845 373 0405  
E: socialwelfare@markelintl.com  
W: www.markeluk.com/socialwelfare

### Specialist insurance for the charity sector

Markel protect thousands of charitable and commercial organisations who provide care, support and advice for disadvantaged or vulnerable people including:

- Charities
- Community groups
- Not for profit organisations
- Care providers
- Trustees

Our specialist charity insurance provides cover against a whole range of risks, giving you the peace of mind that if something unexpected happens, your organisation is covered by an expert.

We also offer a range of exclusive benefits and services for policyholders providing practical advice and professional help from industry experts to help prevent and manage claims situations.

**Buy direct or ask your broker for a Markel quote.**



# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## INSURANCE



### Stackhouse Poland Limited

New House  
Bedford Road  
Guildford  
GU1 4SJ

T: 01483 407 440  
F: 01483 407 441  
W: [www.stackhouse.co.uk](http://www.stackhouse.co.uk)

Stackhouse Poland look after 400 charities and "not for profit" organisations in the UK.

Our specialist team arrange a broad range of insurance programmes for our charity clients, including property and liability as well as motor, charity trustee cover and travel policies for aid workers, etc.

The Company also arranges insurance for a large number of corporate clients and has a specialist private client division advising affluent and High Net Worth clients on their personal insurance needs.

Please see our website for the video outlining our services to the Charity sector or contact us to discuss our 10 point Charity checklist for Insurance.

Insurance Broker of the Year 2013  
Independent Regional Broker of the Year 2007  
Finalist Independent Regional Broker of the Year 2009



### Unity Insurance Services

Suites 10 & 10A The Quadrant  
60 Marlborough Road  
Lancing Business Park  
Lancing, West Sussex  
BN15 8UW

T: 0345 040 7702  
F: 0345 040 7705  
E: [info@unityinsuranceservices.co.uk](mailto:info@unityinsuranceservices.co.uk)  
W: [www.unityinsuranceservices.co.uk](http://www.unityinsuranceservices.co.uk)

### Insurance for charities with 100% of our profits returned to charity.

As a charity owned insurance broker, Unity Insurance Services has a unique insight into your sector. For over 80 years, we have been protecting the people, property, liabilities and activities of charities.

We view each charity as unique so we always aim to provide solutions that fit your exacting needs. That's why we will spend the time to understand in detail your activities and risks to obtain the best possible cover at the best possible price.

Visit our website or telephone to us to find out more.



### Zurich Insurance plc

Zurich House  
2 Gladiator Way  
Farnborough  
Hampshire  
GU14 6GB

T: 07730 735394  
W: [zurich.co.uk/insight](http://zurich.co.uk/insight)

### Insight cover – Specialist charity insurance made simple

Zurich works with over 10,000 charitable and voluntary organisations to provide insurance and risk management services. We have dedicated teams who work with charities to understand their needs and provide the appropriate cover, guidance and support. We collaborate with a number of organisations, including NAVCA, ACEVO and CTN.

The Zurich UK business also support an annual £1.9 million grant programme to The Zurich Community Trust (UK) Limited and around 35% of the Zurich UK workforce share their skills with the community each year.

Our Insight insurance cover includes:

- Property 'All Risks'
- Business Interruption
- Trustee Indemnity
- Employer's Liability
- Public & Products Liability
- Professional Indemnity
- Money
- Personal Accident
- Employee Dishonesty

Visit [zurich.co.uk/insight](http://zurich.co.uk/insight) or call us for more information on how we can help your organisation.

## INVESTMENT MANAGEMENT



Charity Investment from Schroders



### Cazenove Charities

12 Moorgate, London, EC2R 6DA

For more information, please contact  
John Clifton :

E: [john.clifton@cazenovecapital.com](mailto:john.clifton@cazenovecapital.com)  
T: 020 7658 3636  
W: [www.cazenovecapital.com/charities](http://www.cazenovecapital.com/charities)

Authorised by the Prudential Regulation Authority  
and regulated by the Financial Conduct Authority  
and the Prudential Regulation Authority.

### Achieving your charities investment objectives takes time and thought.

Cazenove Charities takes pride in understanding the needs of charities today.

As the largest charity team in the UK, we are the trusted partner of over 700 charities. The team of twenty four has a depth of resource, skill and experience and we would be delighted to work with your charity to realise your investment objectives.

For further information, please contact John Clifton on 020 7658 3636 or email [john.clifton@cazenovecapital.com](mailto:john.clifton@cazenovecapital.com)



### Cerno Capital Partners LLP

34 Sackville Street, St James's  
London W1S 3ED

For more information, please contact  
Mustafa Abbas, Nick Hornby,  
James Spence

T: 0207 382 4112  
E: [charities@cernocapital.com](mailto:charities@cernocapital.com)  
W: [www.cernocapital.com](http://www.cernocapital.com)

Cerno Capital works closely with charities, helping them organise and manage their investment portfolios.

It is our view that the only way to obtain a reliable investment return is to identify the prevailing macro-economic themes and then follow a robust methodology for selecting investments. We take a real world approach to risk, concentrating on the risks of losing money and not just the measurement of volatility.

We invest globally, across multiple asset classes and take a long term outlook to wealth preservation and growth.

We act as both discretionary managers and advisors to charities.

# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## INVESTMENT MANAGEMENT



**CHARLES STANLEY**  
The personal investment service

### Charles Stanley & Co. Limited

25 Luke Street  
London  
EC2A 4AR

Nic Muston – Director of Private Clients & Charities

E: nic.muston@charles-stanley.co.uk  
T: 0207 149 6610  
W: www.charles-stanley.co.uk

### The 5 Star Service

We advise and support trustees in the heavy responsibilities of meeting their charity's objectives. Jargon-free and fully bespoke, our investment strategies are specifically designed for each charity. We monitor risk carefully and have six **5 Star Defaqto ratings** for our service. Our 31 local offices access central expertise in:

- ✦ Asset Allocation
- ✦ Ethical Screening
- ✦ Fixed income
- ✦ Passive investments
- ✦ Active fund Research

Authorised and regulated by the Financial Conduct Authority



### Ecclesiastical Investment Management Ltd

19-21 Billiter Street  
London  
EC3M 2RY

Mike Goddings  
Head of Charity Market Development  
T: 020 7680 5839  
E: mike.goddings@ecclesiastical.com

### Profit with principles

That's what we aim to deliver. We believe that a company's business activity, its environmental and community impact and the way it interacts with its stakeholders can all positively contribute to returns, which is why these factors are integral to our global sustainable investment process, and why Ecclesiastical has won numerous awards for its performance.

Call us for details on the Amity Charity Funds and learn how our charitable ownership helps us see things from your perspective, and how your investment can make a real difference.

[www.ecclesiastical.com/charityinvestments](http://www.ecclesiastical.com/charityinvestments)

Ecclesiastical Investment Management Ltd is authorised and regulated by the Financial Conduct Authority



### C. Hoare & Co.

37 Fleet Street  
London  
EC4P 4DQ

Simon Barker,  
Head of Charities  
T: 020 7353 4522  
E: simon.barker@hoaresbank.co.uk  
W: www.hoaresbank.co.uk

### Independence, Stability and Integrity

We offer charities a full bespoke service across investment management, banking, lending and cash administration.

- Stable family ownership for over 340 years
- Strong risk-adjusted performance
- Fully unconflicted with no in-house funds or products
- Simple fee structure
- Award-winning service
- Longstanding connection with the charity sector
- Values supported by philanthropic family



**J.P. Morgan**

### J.P. Morgan

1 Knightsbridge  
London, SW1X 7LX

For more information please contact:  
Tom Rutherford, Head of UK Charities  
T: 020 7742 2819  
E: tom.rutherford@jpmorgan.com  
W: [www.jpmorgan.co.uk/institutional/charities](http://www.jpmorgan.co.uk/institutional/charities)

### Strength, Scope & Commitment

J.P. Morgan is dedicated to helping charities address their investment and financial needs. Drawing on our global resources and 50 years experience in the sector we offer services specific to each Charity's needs.

Acting as both discretionary managers and advisors we work with charities to:

- Tailor investment policy statements and strategies
- Manage a range of portfolios across asset types based on capacity for risk
- Strengthen board governance guidelines

Our Charity team is one of the leading providers to the sector managing assets in excess of £1.4 billion for around 300 non-profit organisations in the UK.



**NEWTON**  
The Power of Ideas

### Newton Investment Management

Stephanie Gore  
Newton Investment Management  
BNY Mellon Centre  
160 Queen Victoria Street  
London  
EC4V 4LA

T: +44 (0)20 7163 6377  
E: stephanie\_gore@newton.co.uk  
w: [www.newton.co.uk/charities](http://www.newton.co.uk/charities)

Newton's sole focus is investment management, with its guiding principle being to enhance the real wealth of its clients. It currently manages £50.7 billion on behalf of charities, pension funds and institutions.

Newton is committed to the charity sector and has a charity business that is very important to it. It has a well-established history as a UK charity investment firm, currently managing £3.8 billion on behalf of its charity clients. Newton uses a distinctive global, thematic approach which is incorporated in its specially designed charity pooled funds and segregated portfolio services. (Data as at 31 December 2014).

[www.newton.co.uk/charities](http://www.newton.co.uk/charities)

# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## INVESTMENT MANAGEMENT



### Odey Wealth Management

18 Upper Brook Street  
London, W1K 7PU  
T: +44 (0) 2072081414  
E: f.dalby@odeywealth.com

*'Odey' comprises Odey Asset Management LLP and all of its subsidiaries and group companies, including Odey Wealth Management (UK) Limited. Authorised and regulated by the Financial Conduct Authority.*

Odey is a respected investment firm known for its focus on performance.

Founded by Crispin Odey in 1992, today the firm employs 110 professionals with offices in London, New York, Geneva and Guernsey.

Odey manages c. £8bn on behalf of a diverse and international client base of private clients, charities and institutions who share Odey's beliefs:

- Good investment management is about results – and not excuses;
- Long term performance requires a flexible approach, a willingness to be early and contrarian and to act quickly when you are wrong;
- Managers should invest their own capital alongside clients.

If you would like to learn more about us, please contact Fay Dalby on f.dalby@odeywealth.com or 0207 2081414



QUILTER CHEVIOT  
INVESTMENT MANAGEMENT



### Quilter Cheviot

Contact: William Reid, Head of Charities  
T: +44 (0) 20 7150 4005  
E: william.reid@quiltercheviot.com  
W: www.quiltercheviot.com

*Quilter Cheviot Limited is authorised and regulated by the UK Financial Conduct Authority.*

The value of investments, and the income from them, can go down as well as up. Investors may not recover what they invest.

Quilter Cheviot is one of the UK's largest independently owned discretionary investment firms, created by the 2013 merger of Quilter and Cheviot Asset Management. The firm focuses primarily on structuring and managing bespoke discretionary portfolios for charities, trusts, pension funds, private clients and intermediaries. Our charity assets under management are in excess of 1.2b\*, making us one of the leading charity managers in the UK.

We offer your charity:

- Direct access to a **dedicated team** with the knowledge and experience to tailor your charity's portfolio to meet its investment objectives.
- An investment process that **can respond rapidly** to changing market conditions.
- Comprehensive **reporting** and access to portfolio valuations via our password protected website.
- A competitive and **transparent fee** structure.

\*01.03.14

RATHBONES  
Established 1742



### Rathbone Investment Management

1 Curzon Street, London, W1J 5FB  
For further information please contact  
Francesca Monti:  
E: francesca.monti@rathbones.com  
T: 020 7399 0119  
W: www.rathbones.com

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

### Rathbones welcomes charities of all shapes and sizes

We like to work in partnership with our charity clients which means you will have direct access to the person managing your charity's investments, resulting in a portfolio that accurately meets your needs and is as individual as your charity.

Key facts

- £3.17 billion of charitable funds under management
- Over 1,000 charities
- Segregated or pooled investment
- Dedicated team of charity investment specialists
- A history grounded in philanthropy

*All figures as at 31st December 2014*



### Royal London Asset Management

55 Gracechurch Street  
London, EC3V 0RL  
Contact: Alan Bunce, Head of Institutional  
Business – Direct  
T: +44 (0)20 7506 6570  
E: alan.bunce@rlam.co.uk  
www.rlam.co.uk

*RLAM is authorised and regulated by the Financial Conduct Authority.*

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

RLAM is proud to manage £3.2 billion in assets on behalf of over 170 charity clients. We pride ourselves on the breadth and quality of the investment options we offer, and we recognise that your main focus is your charitable activity; ours is to construct the best possible investment portfolio, often in multi-asset solutions, to meet your risk and return objectives. Whatever your requirements, we are well positioned to offer a solution.

*All data as at 31 March 2015.*



### Ruffer LLP

80 Victoria Street  
London  
SW1E 5JL  
For more information contact:  
Christopher Querée  
T: +44 (0)20 7963 8100  
F: +44 (0)20 7963 8175  
E: cqueree@ruffer.co.uk

Ruffer is an absolute return investment manager. Instead of following benchmarks, we aim not to lose money on a 12 month rolling basis and to deliver a return greater than the risk free alternative of cash on deposit. Capital stability is essential to provide a sound platform for income generation and for growth of capital and income. By aiming to avoid the cyclical gyrations of the market, we aspire to provide a less volatile experience for our charity clients. We manage over £17bn of assets including £2bn for over 290 charities as at 31 December 2014. Our charity clients span all major charitable sectors and include some of the largest endowments in the UK. A dedicated portfolio manager works with each charity to build an appropriate segregated portfolio, which may include ethical screening if required. A Common Investment Fund is also managed within the Ruffer Group.

*Ruffer LLP is authorised and regulated by the Financial Conduct Authority*

# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## INVESTMENT MANAGEMENT



### 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.sarasinandpartners.com

Sarasin & Partners manages 335 charities with over £5 billion in charitable funds\*, representing 35% of the firm's total Assets under Management. We also manage investments for UK private clients, pension funds, and other institutions with total funds under management of £14.1 billion (\*as at 30.09.2014).

Our particular expertise is determining and reviewing the appropriate mix of asset classes suitable to meet the circumstances of each charity.

We are well known for our commitment to education having trained over 3,000 trustees. The reference for this training is our Compendium of Investment.

*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 Conduct Authority.*



### UBS

3 Finsbury Avenue  
London  
EC2M 2AN

Andrew Wauchope - Head of Charities  
E: andrew.wauchope@ubs.com  
T: +44 20756 70166

W: www.ubs.com/charities-uk

### Charity focused, performance driven

Access all the investment insight and guidance your charity needs through our dedicated team of experts, structured and ethical investment process and worldleading research.

The value of your investments may fall as well as rise as a result of market and currency fluctuations. You may not get back the amount you invested.

Authorised and regulated by Financial Market Supervisory Authority in Switzerland. In the United Kingdom, UBS AG is authorised by the Prudential Regulation Authority and is subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request.



### Waverton Investment Management

16 Babmaes Street  
London  
SW1Y 6AH

Contact: Emma Robertson  
T: +44 (0) 20 7484 2065  
E: erobertson@waverton.co.uk

### The home of quality investing

Waverton, formerly J O Hambro Investment Management, provides bespoke investment solutions combined with a highly personalised service. This allows us to deal with a range of mandates from the straightforward to the more complex and demanding. All charity portfolios, whatever their size, are managed on a segregated basis. We do not run a single charity vehicle or model portfolios as this inflexible approach is the antithesis of our culture.

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

*Waverton Investment Management Ltd is authorised and regulated by the Financial Conduct Authority. The value of an investment can fall as well as rise and you may get back less than originally invested.*

## INVESTMENT REVIEW SERVICES



### TSA

50 Andover Road,  
Tivoli, Cheltenham,  
GL50 2TL

T: 01242 263167  
F: 01242 584201  
E: James@3sector.co.uk  
W: www.3sector.co.uk

### Independent Charity Reviews

TSA provides independent investment reviews and training for trustees to assist with fund management.

We can help you with:-

- Reserves Policy
- Developing a comprehensive Investment Policy
- Investment policy review – aims & objectives
- Establishment of investment mandate for your manager to work with.
- Independent Search & Selection process – designed to help you look for the right manager
- Continual Trustee guidance to help monitor your investments, and keep up-to date
- Advice on Ethical & SRI approaches to investment

### Advertise your services directly to our subscribers using our Suppliers Directory

If you are a supplier to the charity and not-for-profit sector and want to maintain consistent visibility amongst potential customers then why not include your company within the suppliers section of Charity Times. Your entry would be listed for 12 months (print & online) and includes company logo, contact details and company description/products.

Charity decision makers use this section to find suitable expert suppliers. So call us on 0207 562 4386 with your details and we will create a listing to ensure that your company is visible within this valuable resource.

Call us on **0207 562 4386**

[www.charitytimes.com](http://www.charitytimes.com)

# Suppliers Directory

To advertise in Suppliers Directory contact Sam Ridley +44 (0)20 7562 4386

## MOBILE



### The People's Operator (TPO)

John Finch  
Partnership Development Officer  
The People's Operator  
40 Underwood Street  
London, N1 7JQ

T: 0207 251 6648  
E: [partnerships@thepeoplesoperator.com](mailto:partnerships@thepeoplesoperator.com)  
W: [www.thepeoplesoperator.com](http://www.thepeoplesoperator.com)

The People's Operator (TPO) is the mobile network that gives back to causes: 10% of customers' monthly spend is directed to their cause of choice at no cost to them. In addition, 25% of TPO's profits are passed to the TPO Foundation to distribute to good causes.

TPO offers a great range of Pay Monthly contracts and Pay As You Go bundles, running on the UK's biggest mobile network, supported 7 days a week by the TPO in-house customer services team.

Visit our website today to see how your cause can benefit:

[www.thepeoplesoperator.com](http://www.thepeoplesoperator.com)

## PENSIONS CONSULTANTS, ACTUARIES AND ADMINISTRATORS



### Premier

8th Floor, AMP House  
Dingwall Road  
Croydon Surrey  
CR0 9XA

Contact: Ian Gutteridge

T: 020 3727 9800  
E: [ian.gutteridge@premiercompanies.co.uk](mailto:ian.gutteridge@premiercompanies.co.uk)  
W: [premiercompanies.co.uk](http://premiercompanies.co.uk)

The multi award winning, nationwide provider of employee benefits & independent financial advice. From de-risking to administering your pension scheme, from educating your staff to reviewing your benefit strategy.

### Premier See Change

## RECRUITMENT



### CharityJob

Hannover House, 76 Coombe Road  
Kingston upon Thames  
KT2 7AZ

E: [info@charityjob.co.uk](mailto:info@charityjob.co.uk)  
T: 020 8939 8430

Charity Times has joined forces with CharityJob the UK's number 1 job site for the charity sector. With an average of 4,000 charity jobs advertised every month and over 350,000 job seeker visits, [www.charityjob.co.uk](http://www.charityjob.co.uk) carries more charity jobs than any other UK job board, saving you money and time.

To advertise your job vacancies on Charity Times and CharityJob website simply log into your CharityJob account. Alternatively call CharityJob on 020 8939 8430 or email the sales team at [info@charityjob.co.uk](mailto:info@charityjob.co.uk) for further assistance.

In order to help you generate the best response to your recruitment campaigns, we have developed a choice of great value job listing products. You're listing on the Charity Times website is only £65 per vacancy if you book one of the following packages:

- Single Listing: £195 + VAT
- Enhanced Plus Package: £475 + VAT
- Enhanced Package: £375 + VAT
- Premium Package: £575 + VAT

## SOFTWARE PROVIDERS



### bluQube

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

E: [hello@bluqube.co.uk](mailto:hello@bluqube.co.uk)  
T: 08456 44 77 88  
w: [www.bluqube.co.uk](http://www.bluqube.co.uk)

Simply, bluQube is a comprehensive finance and accounting system designed to assist your charity in solving every day financial challenges in a practical and simplified way.

bluQube has been specifically developed to help charities challenge the way they think about finance.

Through cloud and browser-based technology with multi-device access, bluQube transforms finance operations to deliver cross-organisation efficiencies, sophisticated management information and a different way of seeing finance. With a user friendly interface designed to provide your core finance team with all the necessary functionality they need, while remaining intuitive for non-finance budget holders and senior management to tap in and access at a glance information, bluQube will usher in an all new level of efficiency to the way your charity operates.

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

### Advertise your services directly to our subscribers using our Suppliers Directory

If you are a supplier to the charity and not-for-profit sector and want to maintain consistent visibility amongst potential customers then why not include your company within the suppliers section of Charity Times. Your entry would be listed for 12 months (print & online) and includes company logo, contact details and company description/products.

Charity decision makers use this section to find suitable expert suppliers. So call us on 0207 562 4386 with your details and we will create a listing to ensure that your company is visible within this valuable resource.

Call us on **0207 562 4386**

[www.charitytimes.com](http://www.charitytimes.com)

# ALL SYSTEMS ACTIVE

A challenging investment backdrop calls, we believe, for charities to take a truly active approach to investing. Being active is not simply about having the conviction to construct strategies and portfolios that look different from market indices. It means approaching all aspects of our clients' interests in a thoughtful and committed way – from speaking up about the issues that shape investment opportunities and risks, to allocating assets across the capital structure with a clear perspective, investing responsibly and engaging with our clients on ethical concerns.

Call Stephanie Gore on **020 7163 6377**  
or email [stephanie\\_gore@newton.co.uk](mailto:stephanie_gore@newton.co.uk)

 [@NewtonIM](https://twitter.com/NewtonIM)

[www.newton.co.uk/charities](http://www.newton.co.uk/charities)

**NEWTON**  
The Power of Ideas



**BNY MELLON**

**This is a financial promotion.** In the UK, this document is issued by Newton Investment Management Limited, The Bank of New York Mellon Centre, 160 Queen Victoria Street, London, EC4V 4LA. Registered in England No. 01371973. The value of investments and the income from them can fall as well as rise and investors may not get back the original amount invested. Newton Investment Management is authorised and regulated by the Financial Conduct Authority. The opinions expressed in this document are those of Newton and should not be construed as investment advice.