Annual Conference

Managing risks, taking opportunities

9 June 2016 The Waldorf Hilton, London

Delegate pack

Find out more: @CharityTimes #CTconference

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Institute of Fundraising



PS Financials





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Timings

Annual Conference

- 8.30 9.00 Registration and refreshments
- 9.00 9.05 Chair's opening remarks
- 9.05 9.35 Keynote speaker: Setting up the new Fundraising Regulator
- 9.35 10.00 Growth, income and dependability a powerful combination
- 10.00 10.25 Find out how modern accounting technology can transform your charity's finances
- 10.25 10.50 Absolute or relative return investing for charities?
- 10.50 11.20 Coffee break
- 11.20 11.45 Keynote speaker: Is social investment right for you?
- 11.45 12.10 Risk or opportunity?
- 12.10 12.35 The journey from accounting to business intelligence

12.35 - 13.30 Lunch

- 13.30 13.55 Keynote speaker: Update from the Charity Commission
- 13.55 14.20 Multi-asset investment for charities
- 14.20 14.45 Young People's Foundations a new model to support children and young people
- 14.45 14.55 Comfort break
- 14.55 15.20 Appropriate asset allocation for a changing investment world
- 15.20 15.45 Fundraising standards and practices
- 15.45 16.15 Keynote speaker: The Minister for Civil Society
- 16.15 16.30 Chair's closing remarks

16.30 - 17.00 Complimentary drinks reception

Welcome

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Annual Conference

WELCOME

On behalf of **Charity Times Magazine**, we would like to welcome you to the **Charity Times Annual Conference**, and hope that you find it both interesting and informative.

DIETARY REQUIREMENTS - If you have any dietary requirements aside from a vegetarian option, please notify staff at the registration desk at your earliest convenience. Vegetarian meals are already catered for. Lunch & coffee breaks will be held in the conference facilities outside the conference theatre.

BADGES - For security reasons, please ensure that your badge is kept on at all times. Please hand in all badges at the end of the conference.

TWITTER - We will be tweeting live from the conference, follow us **@CharityTimes**, make sure you use the official event hashtag **#CTconference**.

RESTAURANT VOUCHERS - The winner of our £150 restaurant vouchers will be announced after the last session of the day. Only delegates who attend by 9am and stay for the full day will qualify.

EVALUATION FORMS - Both the organisers and the speakers would be grateful if you could complete these forms as the conference proceeds. It is an essential source of information on how we can improve our product and an honest opinion is encouraged. The evaluation forms will be collected at the registration desk at the end of the day.

REGISTRATION DESK - Please do come to the registration desk should you have any queries.

MOBILE PHONES - Please ensure your mobiles are switched to silent during presentations.

QUESTIONS - You are encouraged to ask questions. Please wait for a microphone to reach you and state your name and company before beginning. Written questions may also be handed to the staff on the registration desk who will pass them to the conference chairman.

NETWORKING DRINKS - There will be networking drinks after the conference, you are welcome to attend.

Agenda

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8.30 - 9.00	Registration and refreshments
9.00 - 9.05	Chair's opening remarks
	James Money-Kyrle, Associate
9.05 - 9.35	Keynote: Setting up the new Fundraising Regulator
	Gerald Oppenheim, Head of Policy, Fundraising Regulator

Topic synopsis:

An outline of how the regulator will operate - in particular its role setting standards, taking responsibility for the Code of Fundraising Practice, and the Rule Books.

9.35 - 10.00	Growth, income and dependability – a powerful combination
	Dominic Neary, Head of Global Income Growth, Baillie Gifford

Topic synopsis:

Today equities offer both a competitive yield and growth prospects that exceed other income asset classes. By adopting a strategy which emphasises dependability and growth as well as income generation from equities, charities can access a stable and growing income stream for the long term.

10.00 - 10.25	Find out how modern accounting technology can transform your
	charity's finances
	Nicky Wilkins, Head of Consumer Engagement, BluOube

Topic synopsis:

We've become increasingly tech savvy with technology impacting our personal lives in many ways. But what is the impact all these changes will have on the charity sector? We've all heard of cloud, smart phones, interoperability, but how are we using this technology to improve our finance position and efficiency within our organisations?

10.25 - 10.50Absolute or relative return investing for charities?Andrew Pitt, Head of Charities, Rathbones

Topic synopsis:

This session will define absolute and relative return and consider the main features of the two approaches. It will then consider why interest in the debate around 'absolute vs relative return' has increased over the past few years and review the factors to be considered when deciding which approach to adopt.

10.50 – 11.20 Coffee break

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11.20 - 11.45 Keynote: Is social investment right for you? Cliff Prior CBE, CEO, Big Society Capital

Topic synopsis:

The current funding climate for charities, the place for social investment, and Big Society Capital's role in helping more capital reach the frontline.

11.45 - 12.10	Risk or opportunity?
	David McHattie, Head of Charities, Barclays

Topic synopsis:

David will touch on some of the key challenges facing the sector at present, including extended due diligence and borrowing, before exploring the topic of mergers. Do they represent a risk or an opportunity for charities?

12.10 - 12.35	The journey from a	accounting to business intell	igence
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David Singh, Sales and Marketing Director, PS Financials

Topic synopsis:

Financial systems have evolved significantly over the past few years; no longer are they silos of flat accounting data, but are rich repositories of information that goes beyond just accounting which can be viewed in multiple dimensions by managers, stakeholders and trustees.

12.35 – 13.30 Lunch

13.30 - 13.55	Keynote: The Charity Commission and trustees	
	Paula Sussex, Chief Executive Officer, Charity Commission	

Topic Synopsis:

Chief executive Paula Sussex covers some of the items at the top of the regulator's agenda.

13.55 - 14.20	Multi-asset investment for charities
	William Reid, Head of Charities, Quilter Cheviot

Topic synopsis:

A beginners' guide to what multi-asset investment might entail for a charity's portfolio – and what does multi-asset actually mean? What are the benefits of this investment approach and how will the manager take into account specific factors relevant to your charity when constructing a portfolio for your charity?

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14.20 - 14.45

Young People's Foundations - a new model to support children and young people Anna Hoddinott, Grants and Communications Manager, John Lyons Charity and Erik Mesel, Grants and Public Policy Manager, John Lyons Charity

Topic synopsis:

John Lyon's Charity on a new model to support children and young people.

14.45 - 14.55	Comfort break
14.55 - 15.20	Appropriate asset allocation for a changing investment world

Joe McLoughlin, Head of Private Clients & Charities, GAM

Topic synopsis:

As the primary driver of performance in investment portfolios, charity trustees need to consider the appropriate asset allocation when investing. It is important also to gauge the correct amount of flexibility to grant investment managers in pursuit of a target return.

15.20 - 15.45Fundraising standards and practicesPeter Lewis, CEO, Institute of Fundraising

Topic synopsis:

After a challenging year for charities Peter will share his views on what the new Fundraising Regulator, and changes to legislation and practice, will mean for fundraisers and the trustees and leaders of the charities they raise funds for. Reviewing the changes already made, Peter will focus on how the sector can work together to ensure greater public trust and confidence in the way our charities fundraise for good causes at home and overseas.

15.45 - 16.15 Keynote address

Rob Wilson, Minister for Civil Society

Topic synopsis:

The Minister covers some of the pressing themes facing the charity sector from the Government's perspective

16.15 - 16.30	Chair's closing remarks
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16.30 - 17.00 Complimentary drinks reception

Speakers

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Chairman: James Money-Kyrle, Associate

After an early career at the BBC, James has over 15 years leadership of public listed and nonprofit UK foundations, development agencies and environmental NGO's, working to improve social, environmental and economic outcomes. He has proven experience of implementing investment strategies, policy, the selection of investment managers, andinvestment asset allocation and performance reporting. He serves on the Board of Association of Charitable Foundations and the Charity Investors Group promoting best investment practice and was as an adviser to Cabinet Office on social investment.



Anna Hoddinott, Grants and Communications Manager, John Lyons Charity

Anna has been with John Lyon's Charity for eleven years and has been the Grants & Communications Manager since 2007. Her primary areas of expertise include arts and music projects, projects that provide opportunities for young people with special needs and/or disabilities and childcare initiatives. Anna is also responsible for the Charity's marketing and communications including the website and Annual Report.



Peter Lewis, CEO, Institute of Fundraising

Peter, a former City solicitor, took up his role as Chief Executive of the Institute of Fundraising in October 2011. Prior to joining the institute Peter was the Chief Executive of London Voluntary Service Council, which provides advice, training and an independent policy voice for London's voluntary and community sector. Since leaving the law Peter has worked for national homeless charity Crisis, been CEO of the London Cycling Campaign and held a senior role at the Greater London Authority for six years.



David McHattie, Head of Charities, Barclays

David has over 30 years' experience of international and corporate banking with Barclays, before moving into the Public Sector & Healthcare Team as Corporate Director. He now leads a team of Relationship Directors nationwide, responsible for providing banking services to the Charities, Education and Healthcare sectors, delivering a range of solutions from bank debt and capital markets through to day to day banking and deposits. David has previously managed a portfolio of leading Housing Associations and has experience of structuring loan deals to the HA sector.



Erik Mesel, Grants and Public Policy Manager, John Lyons Charity

Erik has been with John Lyon's Charity for seven years. He is responsible for maintaining the close links between the Charity and the local authorities in the beneficial area. Erik also nurtures relationships with other external organisations and sits on the boards of London Funders and CVS Brent. His particular grant-giving focus has been on working with BME groups, supplementary schools and youth clubs.

Speakers

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Dominic Neary, Head of Global Income Growth, Baillie Gifford

Dominic joined Baillie Gifford in 2009 and is Head of the Global Income Growth Team and Manager of The Scottish American Investment Company PLC (SAINTS). Before joining Baillie Gifford Dominic spent time both at Insight Investment, where he managed global equity portfolios, and at Stewart Ivory.



Gerald Oppenheim, Head of Policy, Fundraising Regulator

Gerald is Head of Policy. He was Director of Policy and Partnerships at the Big Lottery Fund until October 2010 when he became a freelancer working with charities, trusts and foundations on a wide range of policy projects. He is a Trustee and Chair of the Camden Society (a charity for people with learning disabilities), a trustee at Citizens Advice Camden and an independent board member of the Asda Foundation. He chaired the former London Bombings Relief Charitable Fund from 2005-2008 and was a member of the BBC Charitable Appeals Committee from 2004-2009.



Cliff Prior CBE, CEO, Big Society Capital

Cliff Prior CBE took up the leadership of Big Society Capital in March 2016. Previously he was CEO of UnLtd which has supported 13,000 people to start up as social entrepreneurs, with cash, coaching and connections, and backs people from start up to investment readiness and major impact. UnLtd is building an ecosystem of support for social entrepreneurs in the UK and is also incubating the Global Social Entrepreneurship Network, a shared learning network for support agencies across 54 countries. Cliff is also a director of health innovation agency UCLPartners, and chaired the mission alignment group for the G8 Social Impact Investment Taskforce.

Andrew Pitt, Head of Charities, Rathbones Investment Management



Andrew Pitt joined Rathbones in June 2014 as an Investment Director and Head of Charities -London, following his previous role as Head of Charities at Newton Investment Management. Andy has also worked at Schroder Investment Management and UBS Wealth Management, and during his career has managed investment portfolios for a wide variety of charities and other not-for-profit organisations, as well as individuals, trusts and corporate. He is also an Associate Member of the CFA Society of the UK (ASIP) and a Chartered Fellow of the CISI (FCSI).

Speakers

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William Reid, Head of Charities, Quilter Cheviot

William has been managing charitable, company and high net worth portfolios since 2003. After working at Laing & Cruickshank and UBS, he joined Cheviot, as a partner, in 2006 and was promoted to head the charities team in 2013. Prior to his City career, he saw service in the Royal Navy (seven years in the Submarine Service) 1991 – 2001. William sits on the fund selection and alternatives committees, as well as being a member of the investment oversight group. Amongst his charitable commitments, he is the independent advisor to the Investment, Finance and Audit Committee of the Royal Navy and Royal Marine Charity.



David Singh, Sales and Marketing Director, PS Financials

David started off his career as an accountant after graduating from London South Bank University, he spent his early years training with the John Lewis Partnership where he qualified, in 1987 David joined a small IBM reseller and has been in the IT industry ever since. Over the past 29 years David has specialised in working with providers of accounting and financial management and ERP software. During this time he has worked with a client base ranging from SME's, multi-national blue chip companies, domestic charities, international charities and NGO's. of users and add significant value not just to the finance department but the whole organisation.



Paula Sussex, Chief Executive Officer, Charity Commission

Paula Sussex joined the Charity Commission as CEO in June 2014. Paula has extensive leadership experience, particularly in delivering solutions and services to the public, private and voluntary sectors. Paula is qualified as a barrister and holds a Sloan Masters Degree from London Business School. She has a longstanding association with Crisis, the charity for single homeless people, where she was a trustee for six years.



Nicky Wilkins, Head of Customer Engagement, BluQube

Nicky first got embroiled in the world of finance when he qualified as an independent financial advisor, helping out organisations of all sizes. Nicky truly understands the role financial management takes in the day-to-day running of an organisation. Nicky's in charge of customer engagement at financial software provider bluQube. He loves to regularly keep in touch with customers throughout the third sector, offering advice and answering questions.



Rob Wilson MP, Minister for Civil Society

Rob Wilson was appointed as Minister for Civil Society on 27 September 2014. He was elected the Conservative MP for Reading East in 2005. Rob made his name as an entrepreneur, building small businesses. He played a leading role in securing a number of major investments in the Reading East area. He has also led 2 successful bids for new schools in the area, including the landmark new University Technical College. The Minister is also responsible for UK statistics, and supports the Minister for the Cabinet Office on public sector efficiency and reform.

charitytimes Awards

Recognising leadership and professionalism

Awards Gala 28 September 2016

Park Plaza Westminster Bridge, London

In association with







Charity Partner

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The 17th Annual Charity Times Awards

The objectives of the awards have remained consistent since their inception:

- To honour the outstanding professionals in the many and varied fields of charity management
- To recognise, celebrate, and promote best practice
- To support continuing professional development
- · Contribute towards raising the standards of charity management
- To promote and raise the profile of the charity sector
- To provide recognition for those who are providing effective support to the sector.

AWARDS GALA DINNER AND CEREMONY

The winners will be announced at the awards gala dinner and ceremony on **28 September 2016 at the Park Plaza Westminster** Bridge, London.

The Charity Times Awards are a great way to recognise and reward staff for their hard work, catch up with friends in the industry, and to develop client relationships. Consisting of a champagne reception, sumptuous dinner, awards ceremony hosted by a celebrity compere and after show party, the Charity Times Awards 2016 will be a night to remember.

£100 from every non-charity table (full tables only) is donated to the Disasters Emergency Committee. Our non-charity fee helps subsidise our charity table prices, which have been frozen in price for over 4 years. We thank all commercial organisations for helping us keep the charity prices as low as possible.

FIND OUT MORE AND BOOK YOUR TABLE: www.charitytimes.com/awards



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WINNERS ANNOUNCED

Better Society 2016 — AWARDS

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