

# charitytimes

**Annual Conference**

**Delegate pack**

**Leading in difficult times**

**10 May 2018 | De Vere Grand Connaught Rooms, London**

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# 2018

charitytimes Awards

## GALA DINNER & CEREMONY

Park Plaza Westminster Bridge, London, 3 October 2018

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Deadline: 7 June 2018

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### 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.

**APPLE WATCH** - The winner of our Apple Watch 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 SURVEY** - Both the organisers and the speakers would be grateful if you could complete the post-conference survey, which will be emailed to you after the event. It is an essential source of information on how we can improve our product and an honest opinion is encouraged.

**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 staff on the registration desk, who will pass them to the conference chair.

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

### AGENDA

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

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

**Lauren Weymouth, Editor, Charity Times**

**09:05 - 09:30** Keynote session: Regulation

**Baroness Barker, Lords Spokesperson for the Voluntary Sector, Liberal Democrats**

**09:30 - 09:55** The impact of Brexit on research

**Dr Julie Maxton, Executive Director, Royal Society**

Brexit presents a significant challenge to UK science, and thus the research undertaken by some of the UK's biggest charities. The EU has played a crucial role in UK science and leaving the EU has implications for science across funding, collaboration, mobility, and regulation and policy. This session will look at what impacts Brexit could have on charity research and what issues the government must address in order to maintain the UK's position as one of the best places in the world for science and innovation.

**09:55 - 10:20** How to navigate Brexit: taking the long term view with your investments

**Andrew Blair, Director, Rothschild**

**Nandu Patel, Managing Director and Head of Charities, Rothschild**

Charity trustees need to take a long-term view – one that extends well beyond the UK's exit and transition from its EU obligations. Nandu Patel and Andrew Blair will discuss why trustees may need to lower their sights in comparison to recent years, what impacts Brexit might have on investments in general and how charity trustees can maintain a suitably balanced portfolio that is capable of delivering inflation-beating returns.

**10:20 - 10:40** Coffee break

**10:40 - 11:05** Money for Something

**Paul Nicoll, Team Manager, Social and Cultural Team, Triodos Bank**

Triodos Bank is part of a global movement aiming to 'finance change and change finance' by providing charities with a platform to bank ethically. Crowdfunding is one of the key methods of finance-raising in a way that profits the planet in the same way charities do. Paul Nicoll will share some examples of the kind of organisations a charity's reserves could fund, the kind of charities who are already banking in this way, and stories from those who have raised finance via Triodos' new crowdfunding platform.

**11:05 - 11:30** Using social media to support social good

**Matthew Hodson, Executive Director, NAM**

Social media provides opportunities for charities to promote their messages, share their resources and directly engage stakeholders. Matthew Hodson, Executive Director of the HIV/AIDS information charity NAM Publications and winner of the Social CEO Awards 2017, shares his experience of using social media to bring about social change, particularly through work that challenges the stigma that surrounds the virus.

### AGENDA

#### **11:30 - 11:55 How can technology really help charities to close the funding gap?**

**Ed Gairdner, Chief Operating Officer, The Good Exchange**

**Marina Steadman, Head of Marketing, The Good Exchange**

You often hear people talk about how charities should adopt 'technology' and 'go digital' - but what can they practically do to take advantage of what is now available? What can trusts and foundations do to drive more efficiency in how fundraising is conducted? What can be done to cut the administrative grant application burden? How can social media become part of a fundraisers' toolkit without requiring an army of professional staff to manage it? Can a collective voice make a difference when it comes to using technology to change how fundraising goals are met? This session will answer these questions and more.

#### **11:55 - 12:20 Managing in uncertain times: Are you adapting to new challenges and opportunities?**

**Pesh Framjee, Global Head of Not for Profits, Crowe Clark Whitehill**

Charities are facing much uncertainty in a challenging environment. There are new laws and regulation, new expectations from different stakeholders, new demands for services, a changing funding landscape. The status quo is not an option and being prepared to manage uncertainty is key to success. This session will help you consider how to be ready to meet new challenges and seize any opportunities.

#### **12:20 - 13:10 Lunch**

#### **13:10 - 13:35 Keeping your charity safe**

**Brian Shorten, Chairman, Charities Securities Forum**

With GDPR imminent, the need to protect information is ever more important. Charities are perceived as an easy target, but have limited resources. So what measures can charities take to enhance information security and meet professional standards? Brian Shorten will look at the challenges posed from fraud and cyber security.

#### **13:35 - 14:00 GDPR: Just a 'tick in a box' – or an opportunity to create value?**

**Elliot Rose, Digital Trust and Cyber Security Expert, PA Consulting Group**

Organisations around the globe need to understand the impact of the GDPR on their organisation and their readiness against the requirements. Elliot Rose will address some of the key issues charities and other non-profit organisations will need to consider, such as:

- how to maintain your inventory
- how to respond to Individual Rights requests (such as the right to erasure)
- how to check your suppliers are able to meet privacy clauses you put in contracts
- how to respond to a regulatory review.

#### **14:00 - 14:25 Difficult times, simple strategies**

**Garrett Harbron, Investment Strategist, Vanguard**

In uncertain markets, it can be difficult to develop an investment strategy that makes sense. This can be particularly challenging for charities that do not necessarily have the time, willingness or ability to make the sometimes complex and always financially impactful choices involved. This session will discuss four simple principles that can simplify these complex decisions and help charities, and indeed all investors, develop investment strategies that endure, even in difficult times.

### AGENDA

#### **14:25 - 14:50 Improving fundraising by learning from complaints**

**Sarah Fox, Head of Casework, Fundraising Regulator**

Complaints provide a valuable opportunity to learn and improve. This session will focus on how the Fundraising Regulator considers complaints about fundraising, give an idea of the numbers and range of complaints received in 2017-18 and discuss how fundraising organisations can learn from the complaints they receive.

#### **14:50 - 15:10 Coffee break**

#### **15:10 - 15:35 Making ethics affordable**

**David Palmer, CEO, Epworth Investment Management**

Investing ethically can ensure charities are meeting their objectives and help to reduce the risk of reputational damage. But how much return do they have to give up to be ethical? This session will explore how trustees can have their cake and eat it when it comes to investing ethically.

#### **15:35 - 16:00 Trusteeship: knowing when it's time to step down**

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

Being honest in the self-reflection of performance isn't always the easiest of tasks, but for trustees, it is essential in order to ensure trustee boards are kept up-to-date and contain a combination of both new skills and new ideas. This session will explore the different types of trustee that exist, and why, if you recognise any of them in yourself, it might be time to step down.

#### **16:00 - 16:25 Reputation and charities**

**Camila Batmanghelidjh, Author and Charity Founder**

The Oxfam scandal has put the third sector under increasing scrutiny once again, meaning charities' reputations are more vulnerable than ever. Camila Batmanghelidjh will look at whether it is possible for charities to safeguard against unexpected risks and attacks, using her experience to talk about what lessons have been learned and a potential way ahead.

#### **16:25 - 16:30 Chair's closing remarks**

**Lauren Weymouth, Editor, Charity Times**

#### **16:30 Onward Networking drinks reception**

### SPEAKERS

#### CHAIR



##### **Lauren Weymouth, Editor, Charity Times Magazine**

Lauren is the editor of Charity Times, the leading business and management magazine for UK non-profit professionals. Every two months it offers a wide range of in-depth, independently-written features and news analysis. Charity Times online complements the printed publication, offering breaking news, a bi-weekly e-mail newsletter and in-depth features, plus jobs, full diary listings, archives and access to the largest marketplace of services for non-profit organisations. This total package combines to offer comprehensive coverage of all the financial, legal, fundraising, marketing and technology management issues facing charities, voluntary groups and non-profits. Advice, information and news from business experts and leading figures in the charity sector make Charity Times essential reading for every non-profit professional.

#### KEYNOTE SPEAKER



##### **Baroness Barker, Lords Spokesperson for the Voluntary Sector, Liberal Democrats**

Liz Barker has been a Liberal Democrat Peer since 1999. She was health spokesperson till 2010 and is now spokesperson on charities and social enterprise, and LGBT rights. Liz has worked on wide range of legislation from pensions reform, through adoption and children, to human fertilisation and embryology. Liz has been a member of pre-legislative, post-legislative scrutiny committees on mental health and mental capacity, charity law. She's been a member of select committees on the future of charities, is currently a member of the select committee on citizenship. She is Vice-Chair of the All Party Parliamentary Group on Global LGBTI Rights, HIV/AIDS, Population Development and Reproductive Health, and Cycling. She is about to Chair the APPG on Sexual and Reproductive Health. Liz is the CEO of ThirdSectorBusiness a management consultancy which specialises in charities and social enterprises in the UK and internationally. She works with a tech company and an advisory board developing digital skills within the voluntary sector. Liz is a VSO volunteer who works with parliamentarians across Southern Africa on HIV/AIDS.

#### SPEAKERS



##### **Brian Shorten, Chairman, Charities Security Forum**

With almost 30 years of experience in Information security, business continuity and risk with companies in the finance, telecoms and charity sectors, Brian left Cancer Research UK in 2012 to take on the full time job of Chairman of the Charities Security Forum (CSF) which he co-founded in 2007. Brian holds a CISSP and has held CISA and CISM qualifications. He was an early member of the Business Continuity Institute (MBCI). He holds a MSc degree in Information security from the University of London, is a Fellow of the British Computer Society and a Freeman of the City of London. Brian has also written many articles and presented on many aspects of information security, especially for the charity/not for profit sector, concentrating on the people side.



##### **Pesh Framjee, Global Head of Not for Profits, Crowe Clark Whitehill**

Pesh Framjee is Global Head of Not for Profits and a partner at Crowe Clark Whitehill, which has been recognised by independent surveys as the leading provider of audit and related services to charities for nine consecutive years. He has been working with charities for over 35 years, and he writes and lectures internationally on matters facing charities and Civil Society. He is an acknowledged expert in the field and a thought leader in areas of financial management, financial reporting, effective governance, strategy, risk management, and performance measurement. Pesh is Special Advisor to the Charity Finance Group, and technical Advisor to the SORP Committee.



##### **David Palmer, CEO, Epworth Investment Management**

In January 2017, David became Chief Executive Officer of Epworth Investment Management Limited. He is a Director of Epworth, leads the Executive Committee and has ultimate responsibility for all aspects of the business. He has previous experience in the asset management industry in the USA, Guernsey and London. David has served on a number of Boards in the Private Client and Hedge Fund sectors. In 2007, he obtained an MBA from the Massachusetts Institute of Technology. David worships at St. Alfege Church in Greenwich.

### SPEAKERS



#### **Sarah Fox, Head of Casework, Fundraising Regulator**

Sarah is the Head of Casework at the Fundraising Regulator where she has worked since 2016. She is responsible for all aspects of complaints and investigations at the Regulator. She previously worked at the Parliamentary and Health Service Ombudsman where she dealt with some of the most high profile and sensitive investigations including the report Midwifery supervision and regulation: recommendations for change.



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

Louise is Head of Policy (Not-for-Profit) at ICSA: The Governance Institute, the professional body for governance. Louise has extensive knowledge of governance issues garnered from her 20-year career in the not-for-profit and public sectors, including education and the NHS, complemented by her experience as a school governor, pension and charity trustee. Her work has covered the development of the code of governance for charities and voluntary organisations, board training, reviews and development, research into sector governance and the production of over 100 guidance notes aimed at the sector.



#### **Matthew Hodson, Executive Director, NAM**

Matthew Hodson is the Executive Director of NAM, a community-based charity that supports both healthcare professionals and people living with HIV by providing news and accurate, impartial, and up-to-date information about HIV and AIDS. NAM's portfolio includes the aidsmap website ([www.aidsmap.com](http://www.aidsmap.com)) one of the most highly regarded non-Governmental sources of HIV information globally. Matthew is on the external advisory group for Public Health England on Sexual and Reproductive Health and HIV and is a member of the International AIDS Society. He was a founding member and steering committee member of the HIV and Hepatitis community action group ReShape, served four years on the Community Advisory Board for London LGBT+ Pride and was on the steering committee for the first European Chemsex Forum in 2016 and for the PrEP in Europe Initiative summit in 2018. Prior to joining NAM Matthew was the Chief Executive of GMFA the gay men's health charity. Matthew has received recognition for his work in HIV prevention, tackling HIV-related stigma and fighting for LGBT equality. Matthew was named overall winner of the 2017 Social CEOs awards.



#### **Elliot Rose, Digital Trust and Cyber Security Expert, PA Consulting Group**

Elliot leads PA's work in GDPR strategy and compliance, working with clients across industries including financial services, life sciences and consumer goods, amongst others. He focuses on meeting legal and regulatory requirements, while also creating business advantage. More broadly, Elliot has over 20 years' experience working with a range of public and private sector organisations, on areas such as information management, information assurance, digital trust, cyber security, and risk and compliance.



#### **Andrew Blair, Director, Rothschild**

Andrew is a senior client adviser who joined Rothschild in 2015. Prior to joining the charities team in 2017, he was Head of UK Sales for Rothschild Asset Management, responsible for all asset management distribution across different client segments. Previous to Rothschild, he worked at Mirabaud Asset Management as Joint Head of UK Sales and Marketing where his investors included many leading UK charities. Prior to Mirabaud, Andrew was Head of Sales at Skandia Investment Group. Andrew is a qualified pensions trustee and has been recently shortlisted to be a trustee for 2 major UK charities. Andrew read Theology at Robinson College, Cambridge and holds the Chartered Wealth Manager qualification.

### SPEAKERS



**Nandu Patel, Managing Director and Head of Charities, Rothschild**

Nandu is Head of Charities and joined Rothschild in 2010. Prior to joining Rothschild, Nandu spent 20 years working for Morgan Stanley, where he developed their charity business. Since joining Rothschild he has built a dedicated charities team of 6 people and charity assets under management have increased by c. 230%, representing 11% of the Wealth Management business in the UK. Nandu founded and remains a trustee of a grant making UK registered charity focused on education, health and relief of poverty in the UK, East Africa and the Indian sub-continent. Nandu graduated from Cambridge University (Downing College) with a Masters in Economics. He has been a member of Downing College's Alumni Campaign Board for over 10 years. He is a Chartered Insurer and a member of Chartered Securities Institute.



**Dr Julie Maxton, Executive Director, Royal Society**

Dr Julie Maxton is the Executive Director of the Royal Society, the first woman in 350 years to hold the post. Before taking up her position at the Royal Society in 2011 Julie was Registrar at the University of Oxford, the first woman in 550 years in the role. She is an Honorary Fellow of University College Oxford, a Bencher of the Middle Temple, a Freeman of the Goldsmith's Company, and a Board member of the Charities Aid Foundation, the Alan Turing Institute and the Faraday Institute. In the past she has also been on the Boards of the Blavatnick School of Government in Oxford; Haberdasher Aske's School (Elstree) and Engineering UK. Originally trained as a barrister at the Middle Temple, Julie combined a career as a practising lawyer with that of an academic, holding a number of senior academic positions, including those of Deputy Vice Chancellor, Professor and Dean of the Faculty of Law at the University of Auckland, New Zealand. Academic and other recognition Julie has received include a CBE (2017) and Honorary Degrees from the Universities of Huddersfield (2016); Canterbury (2017) and Warwick (2018). She is the author of numerous articles concerned with trusts, equity, commercial and property law.



**Ed Gairdner, Chief Operating Officer, The Good Exchange**

Ed Gairdner is the Chief Operating Officer at The Good Exchange, a transformational cloud platform designed specifically to address one of today's biggest charitable fundraising challenges – how to best match those organisations and individuals who have money to give to good causes to those who need it most. Ed's experience from his time in the dynamic IT sector opened his eyes to the fundamental changes that technology is bringing to the way we live and work, and he is passionate about enabling the charitable sector to benefit from these innovations. With Ed at the helm, The Good Exchange aims to revolutionise the way that funders and charitable projects collaborate, to streamline the charitable application and project management process and help bring about a better and more inclusive society for everyone. Before joining The Good Exchange in September 2016, Ed was the Director – Security & Business assurance at Huddle, a global Software-as-a-Service (SaaS) collaboration solution. During his time at Huddle, Ed led the business operations and legal teams and managed the company's information security (ISO 27001), compliance and risk management programs. He led Huddle to one of the first approvals for use of a cloud solution by a UK government department at GCHQ and gained US government FedRAMP (Federal Risk and Authorization Management Program) approval for the company. Prior to Huddle, Ed was Operations Director at FastMarkets, a subscription-based cloud platform for metal markets information. Ed's career before joining FastMarkets didn't follow such a traditional path. After graduating with a BA(Hons) in Business Studies from Birmingham City University, Ed spent almost twelve years in the British Army, finishing as a Major in The Queen's Royal Hussars. He served multiple Operational Tours in Northern Ireland, Kosovo and Iraq. On leaving the army, Ed spent nine months providing project management support to the entrepreneur James Caan, probably best known for his role on BBC's Dragons' Den.

### SPEAKERS



**Marina Steadman, Head of Marketing, The Good Exchange**

Marina is an international marketing director with many years' experience marketing cloud, SaaS and on-premise IT solutions for start-ups & global enterprises. As Head of Marketing for The Good Exchange, her role is to bring this experience into the charitable sector – raising awareness of how on-line funding, fundraising and matching platforms can drive transformation and help to close the funding gap. Before joining The Good Exchange, Marina was director of global field marketing at ClickSoftware, driving demand for their field workforce management solutions across the world. She has previously held a variety of senior marketing roles in companies ranging from VC-backed start-ups to established segment leaders. Marina was also Enterprise Segment Marketing Manager at Microsoft UK where she provided strategic and tactical marketing support to drive Microsoft's corporate business. Starting her career in marketing and business development roles in blue-chip organisations such as IBM and Fujitsu, she gained particular expertise in product and industry marketing. Marina is a Chartered Marketer and has a degree in Business Administration from Bath University.



**Paul Nicoll, Team Manager, Social and Cultural Team, Triodos Bank**

Paul joined Triodos in 2006 and has over 30 years banking experience in a variety of senior lending and relationship management roles. Paul manages a portfolio of charities and businesses spread around the country, but predominately in the south of England. He has a particular focus on working with health and social care organisations. Since 2006 he has also served as a trustee on the board of an environmental and educational charity.



**Garrett Harbron, Investment Strategist, Vanguard**

Garrett Harbron, CFA, CFP, is an investment strategist in Vanguard's Investment Strategy Group. He is a member of the teams responsible for conducting research and developing strategy on financial planning and retirement topics. Mr. Harbron has worked in the financial services industry since 2003 as a financial advisor, retirement plan wholesaler, and compliance consultant. His areas of expertise include workplace pension plans, financial planning, strategic and tactical asset allocation, passive and active investing strategies, and alternative investments. Before joining Vanguard in 2011, Mr. Harbron worked for Merrill Lynch, OppenheimerFunds, and Wells Fargo Advisors. Earlier in his career, he practiced law for five years in the United States.



**Camila Batmanghelidjh, Author and Charity Founder**

Camila qualified as a psychotherapist in her early 20s and founded two children's charities: Place2be, which offers counselling to children in schools; and Kids Company, which for 19-years, supported the most vulnerable children and families. Camila's sole focus has been, as she describes it, representing the children and families impacted by lack of social justice. Over the 35-years, she has devoted to work with vulnerable children. She has been recognised through a number of British and international awards. Some of Camila's clinical models have been replicated internationally. She remains uncompromisingly outspoken and solely interested in the welfare of children whose courage and fortitude has been her source of inspiration. She is currently writing a book in partnership with scientists on childhood maltreatment and its implications, as well as treatment. She continues to work with vulnerable children, whilst acting as a consultant to a number of organisations.

# BOOK YOUR TABLE

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24 May 2018, London Marriott Hotel Grosvenor Square

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