

## News:

### Retail

The re-opening of charity shops saw a record-breaking return to trading

## Diary:

### Sonya Chowdhury

The CEO of Action for M.E on leading through the pandemic

## Guide:

### Digital Guide 2021

A guide to the key digital themes and issues your charity should consider

## Interview:

### Dr Wanda Wyporska

The CEO of The Equality Trust on social media and the fight for greater inclusivity

## Hands up

Is a culture of fear within the sector causing a transparency crisis?



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### LEADERSHIP VOICES

"By pivoting face-to-face services to digital, are we disconnecting from those who need us?"

### Plus:

News, reviews, columns

Sector appointments

See page 56 for charity suppliers' directory

# A positive image

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photos**

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your first  
images visit  
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## Better out than in

Over the past few months, reports of cultural scandals consuming charities have been rife. Although safeguarding has long been a problem for the sector, it appears that 2021 has pulled up the carpet – rapidly, I might add – revealing decades' worth of dirt for the world to see.

As daily reports of racism, harassment and bullying have come flooding in, it's easy to see that charities have failed to do enough to protect their people.

Our cover story (p.20) delves into the sector's problem with transparency in a bit more detail, as we attempt to understand why so many problems are hidden away until it's too late. Psychological analysis will no doubt tell us of long-standing problems with power in the sector (Srabani Sen brilliantly explores this on p.14), as well as a culture of silence.

But after speaking to many of you for this issue, it's clear to see that much of the sector's flaws derive from fear. Whether it's the fear of losing donors, disappointing service users or offending funders; being honest and taking risks is something very few charities are naturally inclined to do.

Despite this, as this issue shows, taking risks almost always pays off. From investing money into cryptocurrency or building a new website (see our Digital Guide, p.35), to starting a coalition (p.31) or changing the way you've always done things (see the case study for Peace One Day, p.47), there are always opportunities to be had by being braver.

One thing we also know to be true, is that things are almost always better out than in. And whilst the constant horror stories are difficult to read; it's a sign of better things to come. After all, has anything good ever come from brushing dirt under the carpet? If anything, it's just going to be a much bigger mess to clean up in the end.



Lauren Weymouth, Editor



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## in brief

### ALL STAFF AT RISK OF REDUNDANCY AT BREAST CANCER CHARITY

Breast Cancer Haven has suspended its services and put all its staff at risk of redundancy, due to its income dropping “significantly” during the Covid-19 pandemic. The London-based charity says that despite a series of cuts, including reducing staffing levels, “we are not able to continue normal operations at this time”. Since March 2020, the charity has closed its five centres and hospital services and been providing support online.



### BURNOUT FEARS RAISED BY CHARITY CHAIRS

Chairs of trustee boards are facing burnout due to increasing financial pressures and rising demand for services amid the Covid-19 pandemic, a survey has revealed. According to the Association of Chairs, which carried out the survey, “the pressure of taking tough decisions in tough circumstances was becoming too much” for many chairs. “Some talked about their concerns of dealing with stress and their fears about burnout,” the Association added.

### ONLINE GIVING BY UK DONORS DOUBLES DURING PANDEMIC

Latest analysis has found that online donations grew by 115% in volume and by 97% in income over the past

*“Online donations grew by 115% in volume and by 97% in income over the past 12 months. The boost is through one-off donations as well as regular gifting”*

12 months. The boost is through one-off donations as well as regular gifting and eclipses the 26% increase in volume of one off donations, and 20% rise in the overall value of online giving between 2019 and 2018. The findings have emerged in creative agency WPNC’s Online Donation Report 2021, through data gathered from gifts made through its online donations platform goDonaate. This represents a total value of £40m, an increase of 29% on 2019.

### BARNARDO’S INVOLVED IN RIVAL NATIONAL LOTTERY OPERATOR BID

Children’s charity Barnardo’s is working with an Italian company to launch a rival bid to run the UK National Lottery. The licence to run the National Lottery has been held by Camelot since 1994. Its current licence is due to expire at the end of January 2023. The rival bid is being launched by lottery operator Sisal in partnership with Barnardo’s.

### JOSEPH ROWNTREE CHARITIES “DEEPLY SORRY” FOR SLAVERY AND COLONIAL LINKS

Joseph Rowntree endowed charitable organisations have pledged to take action to address their benefactor’s “shameful” colonial past and links to slavery. The organisations were endowed with large shareholdings more than a hundred years ago by the Rowntree family’s confectionary company, which benefitted from

slavery. The Joseph Rowntree Foundation, the Joseph Rowntree Housing Trust, The Joseph Rowntree Charitable Trust and Joseph Rowntree Reform Trust have issued statements condemning their organisations’ roots in colonialism.

### NCVO SEARCH FOR A PERMANENT CEO WILL NOT START UNTIL THE AUTUMN

The NCVO will not seek a new permanent chief executive until the autumn, the sector body has announced as part of a raft of senior leadership changes. It will work with recruitment specialists in the summer to “develop a robust and inclusive CEP recruitment process and plan to advertise the role in the autumn”. The decision means interim CEO Sarah Vibert is set to continue in the role for most of 2021.

### INTERIM MANAGER TAKES CHARGE OF RELIGIOUS CHARITY AMID FINANCIAL CONCERNS

The regulator has appointed an interim manager at a charity under investigation amid concerns around late filing of accounts, how it appointed trustees and loan agreements it entered into. An investigation was opened into Jewish charity Beth Yosef Foundation in December 2016 over concerns around its administration and financial management. This includes looking at its potential liabilities and debts as well as how it manages conflicts of interest.

### CRYPTOCURRENCY GIVING ‘STILL A LONG WAY FROM WIDESPREAD POPULARITY’, SURVEY SUGGESTS

The recent fundraising phenomena of donating using cryptocurrencies may have taken a dent, after a recent survey suggested a lack of willingness among the public to fully adopt Bitcoin and other emerging digital alternatives to cash. Latest





polling by YouGov has found that just 5% of the public would be prepared to give up their bank accounts and rely entirely on cryptocurrency. This may indicate that the public continue to see cryptocurrency as a “conventional investment” rather than a form of exchange they can use day to day, YouGov says.

#### CHARITY HANDED ‘RECORD’ £18M IN GOVERNMENT FUNDING AS PART OF CYCLING REVIVAL

The Bikeability Trust is to manage £18m in funding from the Department of Transport to boost cycling training across the UK and promote active travel among families. The funding will be used to run on-road cycle training, the modern day equivalent of the ‘cycling proficiency’ scheme that was commonplace in many schools from the 1940s to the 1980s. This includes courses for beginners as well as more advanced courses on handling busier roads.

#### ST MUNGO’S MAINTENANCE STAFF TO STRIKE AMID ‘BULLYING AND ANTI-UNION’ FURORE

Maintenance workers at St Mungo’s

are to launch an indefinite strike later this month amid allegations of a “bullying and anti-union culture” at the homelessness charity. The strike follows concerns raised earlier this year by Unite, that management at the charity are bullying union leaders working at St Mungo’s. This includes accusations that the charity is targeting union representatives to “hinder them carrying out their union roles on behalf of staff” said Unite last month, which added that almost half (44 %) of its representatives are engaged in formal processes concerning their own employment.

#### EIGHT OUT OF TEN CHARITY STAFFERS BACK HOME WORKING POST-PANDEMIC

Charity workers are increasingly keen to continue working from home, even when offices open their doors as Covid-19 lockdown eases. A survey of charity workers has found increasing interest in remote working after a year in which many have been forced to work from home as offices remain shut due to the health crisis. Eight out of ten people would like to work from home more often in the future, according to Blackbaud’s The Future

of Work report. This is up from 67%, cited in Blackbaud’s research in 2020.

#### FREE MENTAL HEALTH SUPPORT BEING OFFERED TO CHARITY WORKERS IN SCOTLAND

Charity workers in Scotland are being offered free training to support their mental health and emotional wellbeing amid the Covid-19 pandemic. The training sessions have been backed with £20,000 funding from Foundation Scotland and provided by mental health charity Scottish Association for Mental Health (SAMH). Workers are to be offered a range of virtual sessions, such as support for managers on their mental health as well as sessions on suicide prevention, maintaining wellbeing and building resilience.



#### DIVERSITY CAMPAIGN SET TO ‘NAME AND SHAME’ TOP CHARITIES

Some of the UK’s most well known charities, who it is claimed are “ignoring” the Show The Salary campaign to improve diversity and inclusion in charity recruitment, are set to be publicly named, a social media post from the organisers is suggesting. The campaign group highlighted earlier this year that just 10 of the UK’s top 50 charities have signed its #ShowTheSalary pledge to end salary secrecy. The group says that failing to show the salary when recruiting is fuelling wage gaps and discrimination. But a month on just four more top charities have signed up. The group plans to name charities ignoring its messages.

Charities have reported a strong return to trading for their high street shops as lockdown restrictions lifted on non-essential retail in April.

Among charities to report an increase in sales is Sense, which said its reopening on 12 April broke its one day sales record.

The charity recorded what it calls an “incredible” 85% increase on its previous one day sales record, also set during the pandemic, in December last year.

More than 100 Sense shops opened across England and Wales, with high numbers of stock helping to attract shoppers, according to the charity.

“We’ve been overwhelmed by the support from our communities across the country,” said Sense director of trading Adrian Darkin.

“We’ve had huge numbers of people coming in to donate stock and buy goods, but they’re staying to talk to staff and reflect on what’s been happening over the year.

“It’s only the beginning of course, but to start in this fashion is a huge boost to our staff and volunteers who have had such a challenging 12-months, and have

## Charity shops report record-breaking return to trading

CHARITY SHOPS REOPENED ON 12 APRIL, MARKING A SIGNIFICANT DEVELOPMENT FOR FUNDRAISING. **WRITTEN BY JOE LEPPER**

put everything into the reopening.”

Another to report a robust return to trading is the British Heart Foundation (BHF), which also reported its busiest ever day when it reopened.

BHF recorded more than £1m in sales on 12 April, with furniture among items proving particularly popular among shoppers, said the charity.

“We are absolutely thrilled that in our first day of reopening, our shops made an incredible £1 million in sales, breaking the previous record for a day’s retail trading,” said BHF retail director Allison Swaine-Hughes.

“We saw incredibly strong sales of furniture, as customers look to refresh their homes, and with Spring on the way, also look to update their wardrobes.”

She added: “We want to say a huge thank you to our shops teams, who have worked tirelessly to get back up and running across England and Wales, we couldn’t have done it without you. We are also hugely grateful to local communities who hit the high street to help support us, by shopping and donating - we are so happy to have you back.” ■



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# charitytimes

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# Race report

Charity sector leaders have reacted angrily to the conclusions of the Commission on Race and Ethnic Disparities report, which claimed it could not find evidence of institutional racism in the UK.

The findings come as an increasing number of charities take action to address systemic racism within their own organisation, across recruitment and their support for beneficiaries.

This has also included tackling bullying allegations within the charity sector. However, the Commission found that “we no longer see a Britain where the system is deliberately rigged against ethnic minorities”.

The report, which was published early April, adds that the term “‘institutional racism’ is used too casually as an explanatory tool”.

Campaign group #CharitySoWhite, which tackles racism in the charity sector, said that the Commission’s findings “are not surprising to us”, adding “we are just (perpetually) disappointed”. “We want the charity sector taking the lead in rooting out racism in society – especially in responding to this report,” the group added.

The campaign group also quoted the author Toni Morrison in a Tweet, on how a function of racism “is distraction”.

Mental health charity Mind is among other charities to condemn the Commission’s findings. It says the Commission’s report “has fallen short in the conversation about race equality”. It then details on Twitter a raft of data and evidence of “institutional racism in the UK’s mental health services”.

Another charity to voice concerns is the Equality Trust, which highlighted further evidence of institutional racism across health, the economy and the justice system.

Meanwhile, race equality charity the Runnymede Trust said that the Commission’s report “is a script that has been written for 10 Downing Street”.

## Charities criticise ‘insulting’ and ‘farcical’ race report

THE GOVERNMENT’S RACE REPORT ATTRACTED SECTOR-WIDE CRITICISM AFTER ITS RELEASE EARLY-APRIL

WRITTEN BY JOE LEPPER



“The Commission’s assertion that institutional racism no longer exists is premised on the flimsiest of basis, that “reporting hate crime and race-related incidents is now widely encouraged by police forces”, said the Runnymede Trust.

“In other words, so long as hate crimes are reported, the institutions work just fine. This is as insulting as it is farcical.”

The Trust added: “As we saw in the early days of the pandemic, 60% of the first NHS doctors and nurses to die were from our BME communities, despite the NHS comprising only 20% BME staff in total. For Boris Johnson to look the grieving families of those brave dead in the eye and say there is no evidence of institutional racism in the UK is nothing short of a gross offence.

“Tell those 60% BME NHS doctors and nurses who died from Covid that institutional racism doesn’t exist.”

The Commission released a statement following criticism of its report. “We have never said that racism does not exist in society or in institutions,” it said.

“We say the contrary: racism is real and we must do more to tackle it. That is why our very first recommendation to the government is to challenge racist and discriminatory action and increase funding to the Equality and Human Rights Commission (EHRC) to pursue investigations.

“We reaffirm the Macpherson definition of institutional racism, though we did not find conclusive evidence that it exists in the areas we examined.” ■





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## People on the move...

The latest appointments from around the charity sector

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



### CHRIS TAYLOR

**Movember** has appointed Chris Taylor into the charity's newly created leadership role of chief executive officer. He will lead the 'Movember Experience Team', which looks to combine marketing and distribution, data and insights, innovations, digital engagement, channel and product design and customer experience to deliver on the charity's goals.



### CLAIRE HORWOOD

Claire Horwood has joined **MS Society** as its executive director of engagement and income generation. She has worked at a number of organisations in senior fundraising roles over the past 15 years. Most recently she worked at Mind as the interim associate director of fundraising, launching their first ever public facing emergency appeal.



### MARIA MCGILL

Maria McGill CBE is returning to **Marie Curie** as a new trustee, 24 years after starting her leadership career with the UK's end of life charity. She joins after retiring in February 2020 following a 37 year career in palliative and end of life care for people of all ages. She has held two CEO positions at Children's Hospices Across Scotland (CHAS) and Highland Hospice.



### SIMMY AKHTAR

**Air Ambulances UK** has appointed Simmy Akhtar as its new CEO to lead the organisation supporting the UK's air ambulance charities and wider air ambulance sector. The appointment follows the successful merger of the former membership-based Association of Air Ambulances and the national charity Air Ambulances UK which took place in January last year.



### RICHARD NEWSOME

**Cancer Research UK** has appointed Richard Newsome as its new chief technology officer, as part of its restructure. He joined the charity on 1 April and will report to the COO, Angela Morrison, who has also recently been appointed to the role. Newsome previously led technology teams in retail and consumer goods, including Boots and Cadbury's.



# Appointments



## CLARE MORIARTY

Dame Clare Moriarty has been appointed chief executive of **Citizens Advice** for England and Wales.

Moriarty takes the reins at a crucial time for the charity as it continues to support millions of people affected by the coronavirus pandemic. She takes over from Alistair Cromwell, who has been acting CEO since Dame Gillian Guy stepped down in October.



## EMILY BRISTOW

**St John Ambulance Cymru** has appointed four new trustees to its board, including Emily Bristow, head of customer success for Blue Prism; Nick Stork, fund manager at Development Bank of Wales; James O'Connor, assistant director of corporate finance at Pobl Group; and Helen Willson, volunteer and participation consultant for the National Trust in Wales.



## HEATHER BLAKE

The charity **Changing Faces** has appointed Heather Blake as its new chief executive officer. She brings experience of senior leadership and health care to the role and is currently the director of support and influencing at Prostate Cancer UK. She is also a trustee and chair of the Patient Services Committee at Royal Trinity Hospice, Clapham.



## JASMIN KOASHA

**Heart of England Community Foundation**, has appointed two new trustees to its board: Jasmin Koasha and Calum Nisbet. Koasha, a solicitor at Anthony Collins Solicitors, and Nisbet, the commercial director at Black Country Chamber of Commerce, are expected to play an instrumental part in the charity's plans to navigate a post-pandemic world.



## ANDY GRAHAM

Andy Graham has been appointed to the position of chief executive officer at the Chilterns MS Centre, an independent charity that offers therapy and support for people living with multiple sclerosis. The charity has been without a CEO for over a year, and Graham was previously the organisation's chief operating officer.



## STEVEN KEMP

Steven Kemp has been appointed the new chairman of **Rapport Housing and Care**. He will replace Zach Miles, who has held the role since 2014. During his time with the charity, he oversaw home closures, new openings and led the Abbeyfield movement. Kemp will step up from his current position of trustee, with a background in social housing.

## Diversity

### "SEWELL REPORT: WHAT'S REALLY GOING ON? NO, REALLY..."



**SRABANI SEN  
IS CEO AND  
FOUNDER OF  
FULL COLOUR  
AND CHAIR OF  
ACTIONAID**

Much has already been said in response to the government's Report of the Commission on Race and Ethnic Disparities (see p.10 for more information on the sector's response to the report).

To say that the Commission, chaired by Dr Tony Sewell, caused controversy is an understatement. The media, commentators and organisations working on race have been united in their condemnation, questioning the way the evidence was gathered and interpreted, the conclusions and indeed who actually wrote the report.

Two days before writing this column, there were even reports in the media that the commissioners didn't get to see or sign off the final draft of the report that bore their names.

From the outside looking in, it is difficult to make sense of how we ended up in the position we have. Some claim that the conclusions of the Commission were determined before evidence gathering had even begun. What I am curious about, is if that is indeed the case, then why did those who shaped the report need it to say what it did?

#### Culture wars

There has been much talk in the media recently about culture wars. The choice of the word "wars" is telling. These "wars" are playing out in all sorts of ways, and the Commission on Race and Ethnic Disparities report has been cited as one of the most overt examples of a concerted campaign against the direction in which society is travelling.

What seems to underpin these culture wars is the sense of fear from those who want to hold back the tide. Fear that their power and position in the world is being taken away from them. Fear that people who think differently are taking over. Fear of becoming irrelevant.

There is a saying well known to those working in the equal rights arena: "Equal rights for others does not mean less rights for you. It's not a pie".

Arguments like this are used to convince those who feel that they are losing out that they have nothing to fear. While this saying is brilliantly pithy, is it really true? The reality of equalising the way society works, is that some of those currently holding all of the power will have to step aside and let other people step in.

This is also true of the way organisations work. If we are to achieve the "equality" in "equality, diversity and inclusion", we have to accept we need to change the way power works in organisations.

#### Understanding power

Does this mean all organisations need to become some variant of an anarchist collective? In my view the answer is emphatically 'no'.

However, it does involve truly surfacing how power – both formal and informal – really works in organisations, charities included. Who gets heard and why, is the way power works enabling everyone to flourish in ways that play to their strengths and talents, and most importantly for those of us in the not for profit sector, is how power works in our organisations really in the best interests of those we exist to serve?

Leaning into this issue is hard. There are no easy answers. But if we don't face issues of power properly, we will still be talking about equality, diversity and inclusion (EDI) 20 years' down the line, without having made as much progress as we really have the potential to make.

If we do lean into this question, the benefits will far outweigh the costs to those who feel that they will have to lose out as things gradually change. While they might be losing some of the pie, one thing is for sure: the pie will taste a heck of a lot better for all of us, them included. ■

## People

### **"NO MATTER OUR STRENGTH AS LEADERS, OUR SUCCESSES ARE ONLY POSSIBLE THANKS TO THE STRENGTH, SUPPORT, AND SKILLS OF OUR TEAMS"**

**D**emonstrating empathy and authenticity through a people-centred approach enables leaders to resonate and build strong relationships with our teams. Communications, visibility (albeit virtually), reassurance and optimism have been clear priorities. Our weekly internal newsletters and biweekly catch ups have been incredibly effective in keeping our team connected, becoming a relied upon source of knowledge and providing colleagues with a space to celebrate our values and successes.

Ensuring every team member feels valued for their role and contribution in achieving the organisation's purpose is essential. Dedicating time to CEO one-to-one sessions with all staff and thank you calls from the leadership team, in addition to shining a spotlight on a team/individual's success have been instrumental in embedding our people centred approach with staff, trustees and volunteers.

#### **Purpose-driven**

Inspiring passion and dedication about your purpose is instrumental in motivating teams to maximise impact and achieve the best possible outcomes for beneficiaries throughout these challenging times. As a leader, being bold and brave has meant safeguarding our future by inspiring staff and supporters to focus on our vision and how this can be achieved by increasing our resilience, relevance and impact.

Being purpose-driven also allows for agility and flexibility. It has been critical for leaders to adapt quickly to the fast-paced, ever-evolving situation. This time last year we were busy preparing for service escalation, de-escalation and maintaining continuity.

Our financial planning was based on a worst-case scenario budget and in April 2020, we launched our first ever Emergency Appeal as a vital step in ensuring the financial sustainability of our life-saving service. The response from our dedicated supporters was incredible; I was

humbled by such a powerful display of philanthropy.

Being a purpose-driven leader also involves having a responsibility and natural urge to constantly assess and reflect upon our learnings to help define our future. In the past year, there has been a particular need for income generation teams to apply innovative techniques in what has been an incredibly challenging fundraising landscape. We will carry key learnings forward, whether it be through continued use of virtual events, digital fundraising or alternative stewardship options.

Fundamentally, having a clear, consistent message throughout has been key to ensuring we are purpose-driven – for us it has been 'We are Team KSS, we will get through this together.'

#### **Value-led**

As a leader, embedding a strong, value-based culture is critical in enabling a team to come together and overcome challenges. Empowering our team to coproduce our value base – caring, trusted, dedicated, innovative and collaborative – has made our team truly collaborative and aligned and has created valued ambassadors who role model and prioritise our shared values. There are leaders within each of us and it is vital that we foster a value-based environment in the workplace where everyone feels able to step up, take ownership and question our approaches as senior leaders wherever possible.

No matter our strength as leaders, our successes are only possible thanks to the strength, support, motivation and skills of our teams, who we must recognise at every possible opportunity.

By putting people at the heart of all we do, being driven by our purpose and led by our values, leaders can inspire individuals to overcome and succeed as a collaborative and aligned team which is vital to the success of any organisation. ■



**DAVID WELCH**  
**IS THE CEO OF AIR**  
**AMBULANCE KENT**  
**SURREY SUSSEX**  
**(KSS)**



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## Profile: Wanda Wyporska

# Amplifying voices

**DAVID ADAMS TALKS TO WANDA WYPORSKA, CEO OF THE EQUALITY TRUST ABOUT HER FIGHT TO REDUCE INEQUALITY AND THE POWER OF SOCIAL MEDIA FOR RAISING AWARENESS**

As most Charity Times readers know only too well, social and economic inequality is a primary cause of many of the biggest problems afflicting society. Dr Wanda Wyporska, executive director of The Equality Trust, is driven by the need to improve understanding of inequality and to force policymakers to take action to mitigate it.

Her commitment to this goal has been shaped by her own personal and professional experiences. She grew up in Chester with her mother and her grandmother. Her maternal grandfather had been a Polish air force pilot who fought with the RAF during the war. Her father, who left the family when Wyporska was very young, was from Barbados. But her mother and grandmother were her greatest influences. They helped inspire her lifelong love of history, literature and the Classics, by taking her on childhood visits to cathedrals, stately homes and museums.

She did exceptionally well at school, winning a scholarship to an independent girls' secondary school. There she was a linguist as well as a historian, studying "Latin, French, Ancient Greek – and Italian on the side". But at around the same time, her grandmother was very seriously injured in an accident, meaning Wyporska became a young carer. "That had a huge impact – I grew up a bit more quickly than most teenagers."

She was fascinated by Poland and spent some of a gap year working there before taking a degree in Polish Studies at UCL. The first phase of her working life was also spent in Poland, living in Krakow and working as a broadcast journalist. She then returned to academia in the UK, studying for a masters, then a doctorate in



Early Modern European History at Hertford College, Oxford. Her work on witchcraft in Poland during the 16th and 17th centuries became the basis for her first book.

### A career change

But the lure of work that could help to improve life in this society inspired a career change. She landed the role of press coordinator for the League Against Cruel Sports in August 2004, just as the legislation banning hunting with hounds was passing through parliament. "It was an amazing time to be in a campaigning organisation, but it was also a lesson about the danger of placing too much faith in legislation," she recalls. "We won the battle, but we lost the war."

In 2006, she took a job at the TUC, where she stayed for seven years, becoming deputy communications manager for unionlearn, a





partnership between the trade unions, employers and government that widens participation in training and learning. In 2012, she moved on to work for the Association of Teachers and Lecturers (ATL), later becoming its lead equalities officer. She was deeply involved in development of the Safer Schools Network, which aims to safeguard schoolchildren online.

Throughout this period, the theme of working to reduce social and economic inequalities was always close to the surface, so her current post at The Equality Trust, where she started working in 2016, feels like a natural fit. But she has sought to change the organisation, putting a greater emphasis on its campaigning capabilities.

“We need to ensure that our research reaches a broader public, in a way that people can campaign on,” she says. “We need a greater awareness of the fact that a lot of forms of inequality are linked. It’s not just about poverty. It’s about housing and why certain communities don’t have access to the same opportunities – or why Covid-19 has affected certain communities more than others.”

She puts great value on the organisation’s work through its network of grassroots activist

groups, which lobby local MPs, councillors and local businesses to highlight the consequences of inequality in their communities. The organisation also campaigns at national level, on issues including equal pay and wealth taxes. One key goal is to persuade the Westminster government to bring Section One – the “socio-economic duty” – of the Equality Act into force. This states that all public bodies have to pay due regard to the outcome of their policies on socially disadvantaged people. The socio-economic duty has already been implemented by both the Scottish and Welsh governments.

### **Tackling inequality from the top**

Wyporska answers diplomatically when asked about the prospects of the current government taking action to reduce inequality. She thinks many politicians are comfortable talking about poverty, “because it’s at a distance from them”, but uncomfortable talking about inequality, “because addressing that involves doing something to the top as well as to the bottom”.

She is enthusiastic about the work the Trust does in collaboration with other organisations, including as part of the international Fight Inequality Alliance. She also contributes to the

work of other organisations seeking to reduce inequality, as a trustee of Equally Ours (formerly the Equality and Diversity Forum), of the youth charity Redthread; and of the Esmée Fairbairn Foundation.

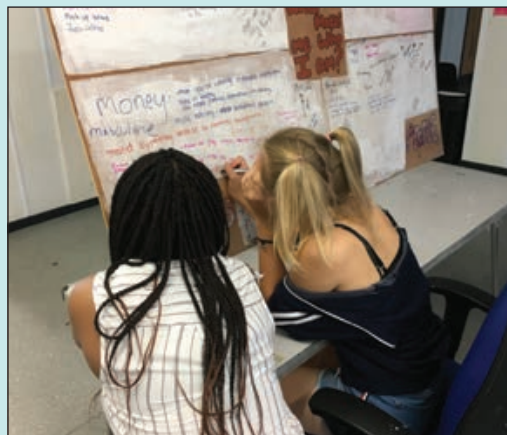
She is an effective champion of the Trust's work and of the other organisations she supports via social media; and was named Top Social CEO for 2020 at the Social CEO Awards. She is modest about her digital track record, pointing out that she didn't enjoy using Twitter when first asked to do so while working for the TUC, but soon realised how valuable social media networks can be as tools for campaigning, amplifying voices that might not get a good hearing in the mainstream media. However, personal experience of trolling is one reason she aims to keep her family life completely private.

The events of the past year have provided ample proof of the need to work towards reducing inequality, but Wyporska is worried about the impact the crisis has had on small, semi-formal grassroots organisations. "They don't have the expertise to get the grants and get into some of the networks," she explains. "My plea would be for some of the larger organisations in the sector – and I know some of them are doing this – to ask, what can we do to help?"

She also thinks there is a need for the third sector to "take a good hard look" at the way its own operations and priorities are shaped by our unequal society. "You have a dominance of middle class, university educated people – and that may sound rich, because that's who I am! – but we need to be far more open in how we support people coming into the sector."

The work the Trust does with young people who are affected by social and economic inequality is particularly important to her. One important issue is helping them to avoid feeling ashamed of their circumstances, which have been created by inequality. Wyporska says this is something she has witnessed throughout her career, but also a feeling she remembers from parts of her own childhood.

"We feel guilty," she says. "We feel bad that we're not wearing the latest trainers and can't go on school trips. We feel the shame of



poverty. I still have a fear of poverty.

"I really want to explain to young people that it's not your fault, it's not your parents' fault, it's society – it comes from the system, it's not you. That's why we're producing schools' resources and focusing some of our work on young people."

This work has already produced some striking results: in 2018, more than 100 young campaigners produced an exhibition of artistic activism, "Who we are, who we aren't", which was exhibited at Tate Modern as part of Steve McQueen's Artists and the City programme.

"I'm incredibly proud of these young people, who have become campaigners," says Wyporska. At the time of writing, the Trust is planning an event in June 2021 that will include the launch of a young person's manifesto for tackling inequality.

Outside work, Wyporska has a happy family life in North London with her partner and school-age son. She still has an active interest in history and is also an enthusiastic practitioner of various arts and crafts ("I've been captivated by pottery over the past year").

Before taking up her current role, she had also started writing a trilogy of witchcraft novels. These have been put on a back burner for now, but considering her track record it seems reasonable to suggest that she will find the time to finish the trilogy in due course. And even if eliminating inequality might be a goal that not even Wyporska can achieve any time soon, you can bet she will give it her best shot. ■



# Hands up

**Allegations of harassment, bullying, and racism have been rife among the charity sector in recent months, highlighting internal issues that have been improperly addressed. Is a culture of fear causing a transparency problem?** **WRITTEN BY LAUREN WEYMOUTH**

**T**wo years ago, CLIC Sargent received sector-wide praise for its annual report, entitled ‘Hands up, we’re not perfect’. The children’s cancer charity specifically used its annual impact report as an opportunity to admit its imperfections, highlight areas in which it had not met targets and to show donors how it was making improvements.

This tactic was extremely successful. The charity won awards, generous press coverage and its CEO at the time, Kate Lee, became renowned for a uniquely authentic leadership style.

But in recent months, many areas of the sector have fallen under the spotlight for failing to adopt such a transparent approach to reporting problems.

Among these was the Chartered Institute of Fundraising (CioF), which came under fire this Spring for its handling of sexual misconduct allegations, which some sector figures claimed weren’t addressed “swiftly or effectively”.

An investigation was also recently launched by the House of Commons International Development Commission into racism in the aid sector. It followed the committee’s recent investigation into sexual abuse and exploitation in the aid sector, which found that “power dynamics relating to racism and sexism may have impeded efforts to

implement effective measures to combat sexual exploitation and abuse”.

Meanwhile, power dynamics and oppression were highlighted in research conducted by Save the Children UK, which found a third of its workers feel excluded or oppressed, with between 20% and 30% of people in the charity saying they feel “excluded in some way” – an issue relating to structural oppression within the organisation.

## Reactive or proactive?

Many organisations – the aforementioned included – have chosen to publicly address such issues. The Chartered Institute of Fundraising (CioF), issued a public apology to the women involved and has since launched an action plan for properly addressing complaints.

Barnardo’s is another charity to have pledged to take action after a racism scandal blighted its fundraising department, while Versus Arthritis published a statement claiming it will act on the findings of a report into allegations of racism and bullying at the charity. Westway Trust, which supported victims of the Grenfell Tower tragedy, commissioned an independent review, which found it had a “long term culture of institutional racism” against the area’s African Caribbean community and the NCVO pledged to take action to tackle racism after

admitting it had a “structurally racist organisation”.

But while a flood of statements and apologies relating to allegations of misconduct show some signs of progression, many in the sector have argued they also appear to be ‘reactive’ rather than proactive. After all, if such issues were dealt with and reported on appropriately at the time, would there even be a need to issue such statements at all?

Dr Colin Alexander, a senior lecturer in political communications at Nottingham Trent University has been researching extensively on the critical understandings of the role of charity within society. He argues it is “worrying” to see the “extent to which some charities have gone to to preserve themselves and their income streams – PR crisis management et al – rather than being transparent and humble over their derelictions”.

“Indeed, where image preservation has taken precedent, charities can very easily be accused of behaving in a similar way to the arrogant corporations looking out for themselves before anything or anyone else,” he says.

## A fear of making mistakes

So why do charities fail to speak up about mistakes at the time said mistakes are made? Rachel Kirby-Rider, CEO of CLIC Sargent suggests a lack of public trust in

# Transparency



recent years has led to fears of losing donors.

“The last few years have been really difficult for the charity sector and, with the erosion of public trust, many charities have felt that upholding their reputation and not doing anything that could jeopardise donor support has been paramount,” she says.

“That has led to a culture of fear of making mistakes, which has often resulted in a not-pushing innovation or a test and learn approach, opting for short-term returns rather than systemic change. The safe option.”

Kirby-Rider believes the funding

model perpetuates this, with leaders fearing funders will pull funding if they disclose when things go wrong with projects and delivery, “which discourages a research and development approach”.

Alex Feis-Bryce, CEO of SurvivorsUK, says the fear can be particularly prevalent among large charities, which are more likely to attract the attention of a ‘hostile media’. “As well all know, the third sector can be a ruthless and cutthroat world with charities and charity leaders under huge and constant pressure to secure the funding to meet the ever-increasing demands

for our services,” he says.

“For some of the more high-profile charities in the public eye, with an often hostile media, I have no doubt that the fear of reputational damage and the knock-on effect for funding and even survival, could create a culture of silence where very significant issues are dealt with internally to avoid repercussions.

Michelle Vickers, CEO of the Head & Neck Cancer Foundation, agrees with Kirby-Rider and Feis-Bryce, suggesting that the public eye can certainly affect how charities address any errors or irregularities. “Most organisations receive no



# Transparency



statutory funding,” she says. “We rely on the public for our very existence, and they enable us to keep doing amazing things.”

## Opening up

While failure to go public with structural issues might temporarily deter reputational damage, the effects on those involved – particularly victims of sexual assault, bullying and/or racism – can be both harmful and long-lasting.

“The pressure of survival and avoiding reputational damage, though very real, is never a justification for brushing racism or sexual violence under the carpet,” Feis-Bryce says. “A culture of silence and fear of speaking out creates a fertile ground for sexual violence to exist and even become institutionalised – we’ve seen this in religious institutions, football, politics and so on. Safeguarding isn’t just about having the right policies in place, it’s about people feeling empowered to speak out without repercussions.

“With regards to racism in the sector, as a white person who has always been an anti-racist campaigner, I’ve come to realise that that’s not enough. We need to reflect on our own privilege and reprogramme ourselves to challenge the structures, which prop up white supremacy throughout society. I hear too often people in positions of power being affronted or becoming defensive when they’re told they need to more – it’s as if they’re scared to show humility and listen for fear that it will be interpreted as them accepting that they or their organisations are racist. They’re part of the problem.”

## Provoking a welcome response

SurvivorsUK is currently working

on a programme of ‘cultural humility’ training for its staff, which aims to improve how its people work with each other and with clients. “We’re also improving and formalising the role of service users in decision-making. This was based on an acknowledgement that we weren’t doing this as good as we should be. I think humility is central to effective leadership,” Feis-Bryce explains.

Other organisations are showcasing some progressive signs, too. Over one hundred leaders from across the sector have already committed to ACEVO and the CIOF’s Racial Diversity Principles, demonstrating proactivity in building more inclusive organisations. Meanwhile, a number of charities, including Oxfam, have set up internal safeguarding committees and have established whistleblowing hotlines, allowing staff to make complaints more easily. Leaders have refused to speak at events that don’t accurately represent the diversity of the sector and have commissioned independent examiners to investigate working life and highlight its flaws.

## “Donors are people too”

Good intentions and productive actions don’t diminish the fear of damage, however. Kirby-Rider understands it is a careful balance to strike, but stresses that the response from donors to CLIC Sargent’s honest impact report was “overwhelmingly positive”.

“Donors are people too and they understand that a charity of our size, focused on trying to support as many children and young people with cancer as possible that depends entirely on donations, is never going to get everything right; in fact it would be a surprise if any

# Transparency

organisation, of any size, can get everything right,” she says.

“We are dependent on the support of our donors so we think it’s important to treat them with respect which means being open and honest with them, even if that means we might get push back or some criticism.”

Vickers also recalls a time of extreme honesty, which resulted in positive feedback. “Many years ago, I worked for an organisation that failed

to meet its well-publicised targets. The CEO at the time faced this failure directly, took responsibility for it and whilst highlighting some of the positives of the organisation, laid out plans to succeed. This honest (and brave) approach was mostly received as a positive step forward. Within the organisation, it felt like we had been knocked down but had come out of our corner fighting, with strong and supportive leadership.”

## Learning from mistakes

Moving forward, Feis-Bryce suggests the whole sector, including funders, must “strive to create a climate where charities can be honest and open about where they can improve without being penalised by funders”.

A strong communications strategy is central to greater transparency, too, Vickers adds. “A communications strategy that is honest and transparent builds trust, not only with existing supporters but also potential supporters.

“Without that trust, there is no basis on which to grow and nurture a positive relationship. This is particularly important now when all charities are experiencing funding challenges. Every donor wants reassurance that their money is being properly utilised. We must give them that transparency.”

But ultimately, Kirby-Ryder believes in a need to stop fearing mistakes. “We are a values-led organisation so if we were to truly uphold the brave and confident values, we had to stop fearing making mistakes.

“On the day we launched our impact report, we received lots of positive reactions from across the sector and have spoken to a lot of other charities who were interested in understanding the reaction we got from supporters.

“The biggest surprise to us was that putting an honest list of the things we didn’t get right or know we need to do more on, was seen as ‘brave’. It’s something we should all do. We want the young people and families we support and all our supporters, donors and volunteers to see us as open and honest and if that means putting our hands up on the things we haven’t got right, then we shall.” ■







# charitytimes

## What is the Charity Times Leadership Network?

The Charity Times Leadership Network is a membership service, created by the publishers of Charity Times, which has been designed to help provide charity leaders with the tools and guidance required to be a stronger and more influential leader.

### What does membership include?

Premium membership to the network includes the following:

- A print edition of Charity Times magazine bi-monthly, delivered to an address of your choice
- Discounts on all Charity Times events in 2021
- A daily e-newsletter, containing key headlines and exclusive, in-depth content on issues affecting charity leadership
- Exclusive invitations to Charity Times events
- Access to regular surveys and reports
- Access to in-depth case studies, exclusive interviews and leadership diaries
- Access to the full archive of Charity Times digital magazines
- A monthly e-mail from the editor, providing a digestible round-up of the month's most popular and important content

Our team of investigative journalists are working hard to uncover some of the biggest trends and

issues from across the sector to ensure our members are constantly kept up to date with all aspects of charity leadership.

Additionally, we've teamed up with leaders from across the sector to help members feel part of a community, whereby sharing ideas and experiences leads to better professional development. Members will be offered the opportunity to share their own leadership experiences – in the form of diaries, case studies, interviews and blogs – in exchange for access to the same content from others across the sector.

### Why should I join?

Good charity leadership has never been more important. By being a part of the Charity Times Leadership Network, you'll be provided with a range of tools designed to help you lead your organisation to success, whilst being influential in the process.

**Sold already? Visit [www.charitytimes.com](http://www.charitytimes.com) to select the appropriate package for you.**



## COMMENT

# How to deal with compassion fatigue in frontline staff

**“The effects of supporting others through traumatic and challenging experiences can be felt for many months”**

WRITTEN BY RUTH COOPER-DICKSON, FOUNDER, CHAMPS FOR CHANGE

**A**s lockdown restrictions lift, so too might some of the pressures that frontline charity workers and volunteers have been enduring. However, the effects of supporting others through traumatic and challenging experiences can be felt for many months and, let's face it, our recovery from lockdown could still be a long bumpy road.

Compassion fatigue is a form of burnout, driven by secondary trauma and stress. While those who experience it are not necessarily dealing with trauma directly, they may be seeing it day in, day out. But just because it's part of the job, it doesn't mean we harden to it.

Often affecting workers and volunteers in caring positions, compassion fatigue can cause exhaustion, anxiety, difficulty concentrating and apathy. If left untreated, it can very possibly lead to a mental health problem such as an anxiety disorder, depression or even Post Traumatic Stress Disorder (PTSD). So, it's important to ensure that those at risk of such burnout are able to access support and can take time to reflect.

I volunteered within the refugee community in Samos last Autumn. It was part of my work with Indigo

Volunteers, a charity that connects independent volunteers with grassroots partner charities working along the European refugee route. I came across the charity in Spring last year, when they were looking for volunteers to provide psycho-social support for volunteers on the ground.

This was during the first lockdown when many of the volunteers who were out in the field were not able to provide their usual support due to community centres and services being closed and the camps maintaining tough lockdown restrictions. For example, the laundry facilities for the entire camp were closed and only reopened just before I left for individuals who had been medically referred with skin conditions such as lice and scabies.

In Samos, there are over 4,000 refugees in the camp and, prior to my visit, I was advised that Covid-19 cases were on the rise, hence the strict quarantine and self-isolation measures that I had to adhere to on arrival.

As we all know, volunteers are very passionate about what they do, so imagine if you're out there trying to make a difference but, due to restrictions, feel unable to help? Another frustration that I am very

aware of from my own experience is you simply cannot help everyone. You never feel as though you have done enough – and this has only been amplified during the pandemic.

For charity workers and volunteers to continue helping others effectively, they need to proactively manage their own positive wellbeing – and that's where the need for psycho-social support such as coaching, other talking therapies and workshops, which provide psychoeducation, comes in.

It's really important that we take a moment to pause and reflect, to take a breath and allow ourselves time to support one another after such a difficult period. Just because the volume of work decreases (if indeed it does) it doesn't mean the impact on us will be any less if we don't take time out for self-care.

If we can stop to consider how we are feeling and what our purpose is, it allows us to proactively manage our own mental health, which ultimately empowers us to support others more effectively. Now, more than ever, charity workers need that opportunity.

**Ruth Cooper-Dickinson is a trauma-informed coach. ■**

# Top 10 leadership recruitment resources

An outline of some of the best resources available to help charities

recruit their leaders. **WRITTEN BY** JOE LEPPER

Charity leadership is changing. Those managing in the voluntary sector need an increasingly broad range of skills, which makes appointing talented leaders vital to the smooth running and dynamism of charities.

A firm grasp of embedding digital capabilities across service delivery, fundraising and day-to-day working practices is particularly needed.

However, many charity leaders lack, or need to improve on, the digital skills needed to ensure their organisation can adapt to challenges, such as the Covid-19 crisis.

A commitment to promoting equality, diversity and inclusion is another vital skill required. This is to ensure that charities and charity sector bodies are not just paying lip service to tackling issues of racism and sexism. Strong leadership can drive meaningful change.

But according to recent evidence, aspiring charity sector CEOs with disabilities and from Black, Asian and Minority Ethnic (BAME) communities are too often being overlooked.

In addition, a report published by ACEVO earlier this year found that disability inclusion within charities is “aspired to but rarely delivered”. One charity leader interviewed said that senior staff with disabilities are “typecast” and overlooked for top

level roles outside of the disability sector.

Ensuring staff, beneficiaries and volunteers are safe is another crucial skill for charity leaders. Too often scandals are emerging around poor safeguarding and complaints handling practices in the charity sector.

Working under pressure, taking tough decisions and managing and engaging with teams and communities are among the other important skills the modern charity leader needs.

When looking for help finding the right boss, it can pay to look outside of the charity sector. Instead of only looking within their own sector, charities can learn from other industries and how they are led.

Here we outline some of the best resources available to help charities recruit their leaders.

## Inclusive Boards

Recruitment agency Inclusive Boards specialises in promoting diversity and inclusion at governance level, across charity boards as well as executive roles.

Support includes an ‘executive leadership programme’ to encourage diversity in senior management. This includes one-to-one coaching, training days and online learning.

Its research found that men

continue to dominate senior roles across the tech sector and FTSE 350 firms. The long lists of candidates it provides for executive roles are 60% female and at least 20% BAME.

## Show the Salary

A useful resource for charities looking for a new leader is the Show the Salary recruitment campaign, to promote equity, inclusion and diversity in the voluntary sector.

Its premise is simple – to encourage recruitment agencies and charities to always #showthesalary when advertising roles. It warns that salary secrecy can fuel wage gaps and discriminate, with women and BAME candidates particularly impacted.

More than 250 charities and recruiters have already signed up to the campaign’s pledges.

Resources include advice on showing the salary, stopping asking for previous salary and “unnecessary degrees”.

## Non Graduates Welcome

We’ve already specified the breadth of skills the modern charity leader needs. It’s a vast list and is often not based on the candidates education background, including their degree. By opening up recruitment of charity leaders to non-graduates charities can harness the skills and talents of a

far greater pool of candidates. This is the message of the #NonGraduatesWelcome campaign, to highlight how organisations are “slamming the door in the faces of talented fundraisers simply because – for whatever reason – they didn’t go to university”. Its resources include links to a range of reports looking at how recruitment can be more accessible and open.

### The Other Box

Training, consultancy and brand partnerships company The Other Box includes a Jobs Board section, TobJobs. This has a focus on promoting anti-racist recruitment through promoting inclusive communications and tackling unconscious bias.

Senior jobs advertised cover a range of sectors, including publishing, digital and creative roles as well as charities.

### TPP

TPP is a charity sector specialist agency that also recruits for roles across a number of sectors, also

including education, health, social care, professional organisations, housing and culture.

It also stresses its commitment to diversity and inclusion and has signed the Show the Salary pledge. It has also developed an equal opportunity, diversity and inclusion policy as well as an action plan.

### Public Leaders Appointments

Another agency to sign the Show the Salary pledge is recruiters Public Leaders Appointments, which helps charities find chief executives, executive directors and chairs.

It says: “In all of the searches that we deliver - irrespective of the role, organisation or sector - we ensure that our search activity encourages interest from a diverse range of candidates and we have secured appointments that have ensured diverse representation across senior leadership teams and boards.”

### Peridot Partners

Peridot specialises in recruiting executives across a range of sectors, including charities, education, government departments and professional bodies.

Promoting diversity is among its focus when recruiting charity leaders and resources include a top tips video from its director of not-for-profit Philippa Fabry for those looking for their first third sector chief executive role.

### Odgers Berndtson

Another recruitment agency to specialise

in recruiting leaders across a range of sectors is Odgers Berndtson.

This includes searching for leaders across the not-for-profit sector, as well as healthcare, consumer organisations, business services, technology and financial services.

This recruitment agency specifies the need for chief executives to have strong technical and strategy skills across technology, regulatory frameworks as well as to look for economic opportunities.

“These skills must be combined with the ability to engage and inspire stakeholders at all levels across the business: from board members and a culturally diverse workforce to consumers and the media,” it says.

### Charity Careers Scotland

Charity Careers Scotland is an online portal for charities to recruit leaders and other roles. Its resources include advice on salary questions, preparing for an interview and advice on preparing a great job description.

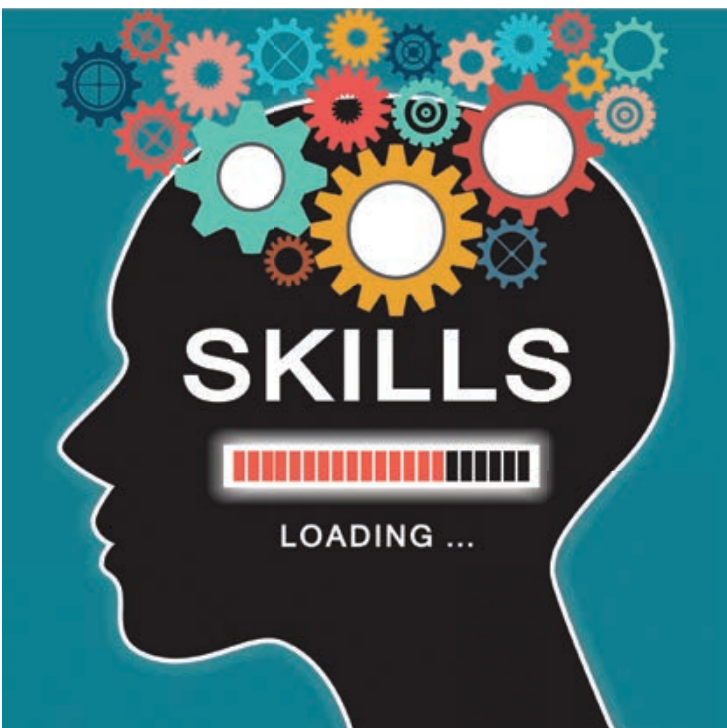
Advice is focused for both candidates as well as charities looking to fill roles.

### Charity Commission

Talented leaders across a range of sectors looking to make the move to a charity chief executive role are advised to access the Charity Commission’s range of resources on charity management.

This covers issues such as risk management and safeguarding, as well as financial reporting and the roles of trustees and staff, as well as information on land, property and assets.

Manging conflicts of interest and holding meetings are other areas covered. ■





## CEO DIARY: Sonya Chowdhury

"The pandemic has created opportunities for us to work closely with other organisations"



SONYA CHOWDHURY IS THE CHIEF EXECUTIVE OF ACTION FOR M.E. SHE CHRONICLES A WORKING WEEK LEADING THE CHARITY, WHICH HAS SEEN DEMAND FOR ITS SERVICES INCREASE DURING THE CORONAVIRUS PANDEMIC.

and endless Zoom meetings, it feels even more important to have that breathing space away from the phone and laptop.

### Tuesday

Today starts with a weekly huddle with my deputy chief executive, Ruth. With our whole staff team of 26 working remotely, this regular contact is more important than ever to make sure we are both up to speed on operational and health policy issues. At lunchtime I join a World Health Organisation global meeting to advance the understanding of 'long-Covid'. The fascinating presentations include an international research study on the impact of long Covid on people's lives. In the evening I have a call with a donor who is also interested in the potential overlap between long Covid and M.E. – it's a hot topic for us and Action for M.E. is working to support and share learning across both communities.

### Monday

My week starts with a non-working day. At Action for M.E., we understand the importance of work/life balance and the need for everyone to have time to reset and switch focus to other priorities in life. For many people living with M.E./CFS (chronic fatigue syndrome), their condition and symptoms fluctuate so its importance for us as an employer to have flexible working practices and the right support in place. Before the coronavirus pandemic, I travelled a lot for work with frequent trips to London for meetings with government officials, funders and partners so I condensed my hours over four days to manage this. Now that working life can be dominated by time online

### Wednesday

This morning I catch up with a board member from another M.E./CFS charity to talk about potential work together. One of the things I love about working with the M.E. community is how active and engaged people are – I see this every day in my email inbox and on social media. Today I respond to an email from someone who wants information and support as they have concerns about the impact of the coronavirus vaccine on their M.E./CFS and to people who have messaged me on Twitter. I am also in touch with *The Guardian* today to support a journalist with a piece about chronic diseases,

such as M.E./CFS, not being included in priority group six for the vaccine. As a charity, we hold a monthly 'Wellbeing Wednesday' for staff and trustees to get together socially, connect and have some fun. Tonight, I'm leading a curry cooking session via Zoom. Although a little nerve-wracking, it's great to get everyone together virtually, and there's lots of chat as we cook together.

#### Thursday

Today starts with our quarterly board meeting and we welcome two new trustees who bring valuable experience of finance and organisational leadership expertise to the charity. The board hears a presentation from a frontline member of staff in our Crisis, Support & Advocacy Service on our work with children and young people. The rich data about service use and outcomes is brought to life with personal stories from those using the service and highlights the increased demand for support from people living with M.E. because of the pandemic. It's an issue that the whole board is acutely aware of and we have invested heavily in expanding services to support more people and to increase access for currently underserved communities, including those from differing ethnic minority groups and people who are more severely affected by M.E./CFS.

During the afternoon, I have several meetings with funders. While the pandemic has been really challenging for many charities, with the cancellation of mass participation events and other fundraising activities, we have been fortunate to have positive relationships with several funding organisations who are keen to work with us to support those living with M.E. through this particularly challenging time and beyond. We discuss the need to support people with M.E./CFS while working collaboratively and strategically to create change for the future. I end the day with a meeting with another medical charity. They share many of our challenges around diagnosis, stigma and lack of research so we discuss how we can collaborate and draw other similar charities together to amplify our collective voice and influence

change for our respective service users.

#### Friday

I have a rolling programme of one-to-one meetings with all colleagues across the charity to hear about their work and any issues on the horizon. Friday is also my weekly huddle with the chair of our board. He is an excellent sounding board and we have a useful debrief on the previous day's board meeting. Our annual governance audit is due shortly, undertaken by our vice chair, so I spend some time preparing the data for this process. The quantitative data is brought to life by the qualitative insight from my discussions with staff and trustees. It gives me much to reflect on and feed into the development of our wider strategy. Towards the end of the week, there is a bit more space in my diary to catch up. The Coronavirus pandemic has led to a fast-changing external environment, with increased demand for services and rapidly emerging health policy. It's important that we keep pace so that we can support those living with M.E., without losing sight of the daily challenges for those with a chronic, fluctuating illness. The pandemic has also created opportunities for us to work closely with other organisations and an appetite for research into post-viral conditions that we have not seen before. I end the week with a regular catch-up with the CEO of an organisation that we are entering into a joint venture with and a meeting with the US National Institutes for Health to discuss further research collaboration. While the pace of change can be breathtaking at times, I feel optimistic about our work towards a greater understanding of M.E. and ultimately a cure. ■

#### Got a diary to share?

If you're a charity leader – CEO, COO, chair, trustee or department head – and would like to document a typical work day, week, or project, please get in touch with the Charity Times editor, Lauren Weymouth at [lauren.weymouth@charitytimes.com](mailto:lauren.weymouth@charitytimes.com).

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TOP 10

# Top 10 charity sector partnerships

We take a look at some of the most interesting partnerships currently taking place within the charity sector. **WRITTEN BY JOE LEPPER**

**C**harities have a strong track record of working together to improve their efficiency and support for good causes.

Often this involves voluntary organisations with the same goals and ambitions working together across fundraising, service delivery, lobbying and their organisation.

The Covid-19 pandemic has arguably accelerated the need of strong partnerships, with charities having to work harder and seek help from more of their colleagues across the sector to influence politicians and deliver meaningful change.

Another factor in partnership building has been Brexit, with charities increasingly coming together to tackle the policy and funding vacuums created by the UK's departure from the European Union.

Here we look at some of the most interesting partnerships currently taking place within the charity sector.

## #NeverMoreNeeded

The central thrust of the #NeverMoreNeeded voluntary sector coalition is to call on the government to inject urgent funding to avert charities closing amid the Covid-19 pandemic.

This major partnership involves a raft of charities including UK Youth and Children England and charity sector umbrella groups including NCVO, Association of Charitable Foundations and ACEVO.

Its recent campaigning has seen hundreds of charities use their social media accounts to encourage politicians to provide urgent funding.

Their campaigning has also included an open letter to Prime Minister Boris Johnson warning that without extra funding for charities people “face a bleak future”.

## Funder Safeguarding Collaborative

Concerns around safeguarding in the international development sector in recent years have prompted five major charity funders to form a collaborative to ensure staff and beneficiaries are safe.

The founding organisations of the Funder Safeguarding Collaborative are Comic Relief, Oak Foundation, Porticus, The National Lottery Community Fund and the Global Fund for Children.

They are also looking for other trusts and foundations, funder networks, NGOs, researchers and government agencies to get involved.

Among its priorities is to develop

training and research to support the charity sector in improving safeguarding processes and policies.

Its mission is to “promote collaboration, listening and learning among funders and organisations to support and strengthen safeguarding practices globally”.

## Charities Against Hate

Sadly, the majority of charity staff have witnessed hate online against beneficiaries and other staff.

To combat hate online as well as support victims a coalition of more than 40 charities formed last year. Those involved include Barnardo's, Mind, Parkinson's UK, Help for Heroes and Stonewall.

Earlier this year the coalition stepped up its campaigning to call on social media companies to offer swifter access to support.

Stricter penalties and lifetime bans for hate online are among other proposals the coalition wants considered by policy makers.

The group has also developed a toolkit to help victims to lobby their local MPs to tackle hate online.

## Health charities link up for vaccination roll out

A partnership of 16 charities that support people with underlying health conditions was formed earlier

# Sector partnerships

this year to support the roll out of the government's Covid-19 vaccination programme.

Their aim is to encourage their beneficiaries, who have conditions such as HIV, cancer, diabetes and asthma, to take up offers of vaccination.

Charities involved include the British Heart Foundation, Mencap and Diabetes UK.

Among their campaigning has been to offer reassurances of the safety of vaccination. This includes the AstraZeneca vaccine that had been suspended for a short period in Europe over fears around blood clotting.

## Gift Aid Emergency Relief coalition

Hundreds of charities and umbrella bodies joined a coalition calling for a temporary increase in Gift Aid to help the sector deal with the financial challenges emerging from the Covid-19 pandemic.

Sector groups involved include Charities Aid Foundation and the Charity Finance Group. Charities promoting the campaign include Tiny Tickers, which aims to improve healthcare for babies with serious heart conditions.

The group wants to see the level of Gift Aid claimed on every eligible donation increased for two years. The move could increase charity sector income by £450 million.

## Cancer charities launch formal partnership

In February, Teenage Cancer Trust, CLIC Sargent and Ellen MacArthur Cancer Trust formed a formal partnership with the aim of boosting their campaigning and support for the young beneficiaries they support.



The aim is to improve efficiency through reducing duplication, increase their lobbying power and improve the reach of their distinct areas of support.

Teenage Cancer Trust brings specialist nursing care and emotional support to the partnership, while CLIC Sargent brings its expertise in social work. Meanwhile Ellen MacArthur Cancer Trust offers a support to cancer survivors through sailing and other outdoor activities.

## Children and Young People with Cancer Coalition

Teenage Cancer Trust, CLIC Sargent and Ellen MacArthur Cancer Trust are also among a coalition of 14 founding charities aimed at presenting a more effective voice in lobbying around issues related to the care of young people and children with cancer.

Others involved include Anthony Nolan and Together for Short Lives. The coalition launched three years ago with an open letter to government on areas where progress can be made on improving access to healthcare, including mental health support for families.

## Our Frontline

Mental health has moved up the

agenda of politicians, employers and families alike amid the Covid-19 pandemic. Remote working, social isolation as well as substance and alcohol abuse have increased. Among the most affected are frontline professionals involved in caring for victims of the virus. To help, a partnership of mental health charities, including Mind, Samaritans and Shout, was formed to launch Our Frontline. This pools their distinct support, resources and advice to improve mental health help for frontline workers, including those working for charities.

## Child Food Poverty Taskforce

Among the most successful charity lobbying campaigns in recent years has been the work of Manchester United and England footballer Marcus Rashford and the Child Food Poverty Task Force.

This coalition of charities and food businesses has been calling on the government to #EndChildFoodPoverty, including ensuring disadvantaged children receive free school meals out of term times.

## Product Giving Alliance

Charities infrastructure bodies involved in urging businesses to donate goods and services have linked up amid the Covid-19 pandemic to create the Product Giving Alliance. Those involved are Charity Digital, FareShare, In Kind Direct and International HealthPartners to urge firms to donate software, food and equipment to charities. It aims to highlight the co-operate social responsibility, reputational and environmental benefits to businesses of donating to good causes. ■

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# Why charities must focus on brand to survive Covid-19

**“In uncertain times like these, dramatic action is needed”**

WRITTEN BY TOM PRIMROSE, BRAND STRATEGIST, CURIOUS LONDON

**T**he pandemic has changed the world as we know it. Industries, from travel all the way through to entertainment, have been severely affected by Coronavirus. But none of these have been tougher to witness than the impact on the charity sector.

In uncertain times like these, dramatic action is needed. As we begin to emerge from lockdown, and glimpse the return of ‘normal’ life, charities must be hard on themselves and identify even the smallest of weaknesses that could be holding them back. In times like these, weaknesses must be turned into strengths and used to help them rise. If a charity can rise out of the pandemic, it will never stop. These are four key areas every charity should be considering:

## **Strengthen the brand**

The way a charity represents itself to the public is crucial. A strong brand positioning creates differentiation in market, enables a connection with consumers and ultimately helps build trust. It also helps increase income as consistent branding across all channels increases revenue by 23% (Forbes). A brand’s DNA consists of everything, from the personality and tone of voice, through to distinctive assets such as a logo, typeface and sound design

that will build mental recall with consumers. Revaluating the charity’s brand make up and consistency across platforms will offer a strong foundation to build upon moving forward.

## **Utilise the power of data**

According to a recent survey carried out by Loqate and ACEVO, a shocking 66% of charities aren’t confident in their own data. Areas such as analytics, consumer experience, campaign management and reporting all risk being damaged, which can directly impact an organisation’s efficiency and reputation. With data decaying by 20% year-on-year, it is integral that charities implement a data-driven culture to ensure they don’t damage their brand, infringe on GDPR regulations and lose out on revenue. The key is to start with what data you need, then establish how to collect it and ultimately how to use it effectively.

## **Engage new audiences**

For brands, targeting the correct consumers is fundamental to success both in terms of engagement, but also profit. One tactic to increase profits is to diversify when it comes to audiences, and look outside the box for future donors. Charity target audiences have traditionally been

made up of older demographics. However, a report published by Blackbaud revealed UK Generation Zers and Millennials are in fact the most generous givers. Charities would be wise to open their arms to younger potential donors and explore how to appeal to them moving forwards.

## **Harness digital channels**

The world is digital and for that reason it is crucial that charities utilise key touchpoints to engage with their audiences. The website is an important place to start as it’s seen as the hub. Simplicity wins in this domain, particularly when it comes to the donation page, with over a quarter of web users (26%) dropping out if there are too many fields to complete (Loqate). Email is also a key channel and still ranks best for ROI. Emphasis should be put on email engagement journeys, using compelling imagery and the power of personalisation. Social media, on the other hand, offers charities the chance to experiment with content such as Instagram stories to communicate a narrative.

Embracing these areas will give charities the chance to strengthen their brand for the future and rise once and for all, ready to face further challenges that may await them down the line. ■

DIGITAL FOCUS

# Charity Digital Guide 2021

A guide to help inspire your digital strategy through and beyond the pandemic



## DIGITAL FOCUS: Charity Digital Guide 2021



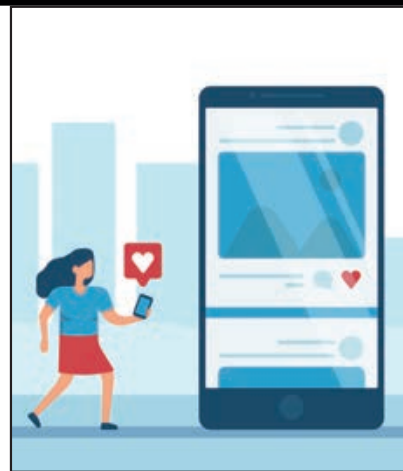
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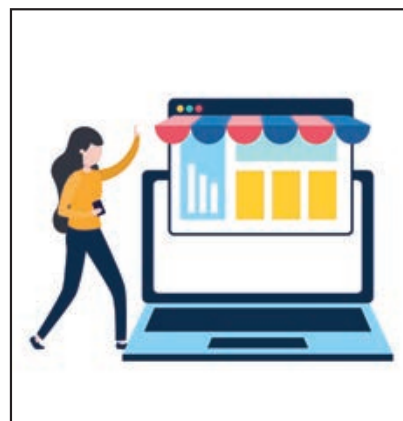
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COMMENT

# Access all areas: Is digital service delivery inclusive?

The internet has been hailed by some as the single biggest success during the past year's pandemic, not only because it has allowed us to work and connect at home during lockdowns, but because it has given us the opportunity to tap into new networks, new sources of information and new businesses. Never have we been in the midst of a global public health crisis with so much technology – and knowledge – at our fingertips.

CFG's recent joint research with Pro Bono Economics and the Chartered Institute of Fundraising shows that three quarters of the charities we surveyed at the end of 2020 had made greater use of digital and technology during the pandemic. Two thirds had innovated to deliver their services remotely and seven out of 10 charities intend to make more services digital in the future.

This transformation has been remarkable, particularly when you consider that in 2019, only 10% of charities reported to the Digital Skills Report that they had been through a digital transformation process that was embedded in all they did.

In 2020, more people than ever before were online at home. The number of households in Britain with internet access increased to 96%, from 93% in 2019 and 57% in 2006.

The increase in internet access during the past year is undoubtedly a positive, but some suggest that

**“By pivoting face-to-face services to digital, are we inadvertently disconnecting from those who rely on us?”**

WRITTEN BY EMMA ABBOTT, COMMUNICATIONS MANAGER, CFG



Covid-19 has not only increased inequality but also the digital divide. Reliable, convenient internet access is only part of the accessibility picture – digital literacy is another. Kira Allman, a research fellow at University of Oxford, writes:

‘...for those lacking in digital literacy or skills, there is no ‘virtual’ replacement for in-person training and assistance. There has never been a more urgent need to re-evaluate the assumption that access alone will make the internet more democratic or equal.

‘When opportunities for physical connections between people are foreclosed, online inequality will increase. In a broad sense, the Covid-19 pandemic has focused our attention on our human interdependence when it comes to health and healthcare, but the lessons are no less relevant to our relationship to the internet. Digital

connectivity is about more than technology alone; it’s also rooted in our shared humanity.’

In our pressing need to pivot from face-to-face delivery to digital services, could we be widening inequalities and inadvertently disconnecting from those who rely on us? Are we doing all we can to be inclusive? What happens, for example, when we deliver services via our websites and other channels that fail to meet the needs of those our charities support?

Recently, some blind and visually impaired Americans struggled to book Covid vaccination appointments because of poor web accessibility. Here we can see that the consequences of inadvertently locking out people of online participation can be devastating.

Familiarising ourselves with the Web Content Accessibility Guidelines (WCAG) is vital for public sector organisations that are now legally required to meet the standards for digital content, including apps. And for all other organisations, there is surely an ethical duty to meet these standards—many of which have been around for more than 20 years! It’s not enough to just throw open our digital doors. We must bring everyone in from the cold. ■

# Cryptocurrency: Which charities are using it and is it worthwhile?

We look at some of the charities that are already giving supporters the option to donate using this emerging form of currency. **WRITTEN BY JOE LEPPER**

To offer flexibility to supporters, many charities are offering the option to give donations using cryptocurrencies. These have been developed over the past decade using blockchain technology, which allows digital information to be distributed in a more transparent way that can help cut fraud.

Among the most commonly known cryptocurrencies is Bitcoin, while others include: Ethereum, Binance Coin, Litecoin, Cardano, Polkadot and Stellar. According to the current market price, one Bitcoin is worth £41,660. Their emergence presents considerable opportunities to boost income through donations, through an increasingly popular form of currency that can be safely and easily transferred.

A key benefit is that cryptocurrencies are decentralised. This means they are used by those involved in the transaction rather than a centralised government. Costs can therefore be lower than dealing with traditional currency, that require third party financial firms and banks that charge fees.

Further cost savings are involved too. They are not linked to geography so currency conversion

costs are reduced. Another benefit is transparency through blockchain technology. This makes it easy for those in the chain to see when changes are made and to trace transactions. For donors, this gives them the benefit of seeing through the blockchain how money is being used by the charity and which projects are benefitting.

However, this emerging form of finance is not without challenges. While the money involved can be traced, the donations themselves can be anonymised easily. This makes it difficult for charities to see who is donating and presents an ethical challenge in ensuring they are not accepting money from a donor who is involved in criminal activity or is involved in activity against a charity's core beliefs.

Another challenge is the environmental cost of producing cryptocurrency. This 'mining' process takes up considerable computer and data processing costs and time. Increasing the use of renewable energy in this process would help this emerging form of currency appeal more to charities.

Here we look at some of the charities that are already giving supporters the option to donate using

this emerging form of currency:

## **Children's Heart Unit Fund receives largest cryptocurrency donation**

Last year the Children's Heart Unit Fund (CHUF) received a cryptocurrency donation of £38,000, which is believed to be the largest cryptocurrency donation to a UK charity. This came from two donors from the US, one anonymous, for the health charity's response to the Covid-19 pandemic.

The sum was donated via the online platform The Giving Block, which is more widely used in the US rather than the UK. One of the donors Dan Bainbridge said: "I was a heart operation baby and have been personally supported by CHUF all of my life.

"I've always wanted to give back and now working in cryptocurrency I saw an opportunity to help CHUF get setup to accept cryptocurrency donations (bitcoin and ethereum) online."

CHUF's director of fundraising and operations Charlotte Campbell added: "We are beyond grateful and really overwhelmed by this generosity in our time of need. We never expected to receive a donation

of this amount and we are incredibly thankful to Dan, our mystery donor and The Giving Block for making this happen.”

The Giving Block says that while large donations from corporate donors are common “it is rare to see donations of this size from individual givers”. CHUF is currently accepting donations using a raft of cryptocurrencies including Bitcoin Litecoin, Zcash, Gemini Dollar, Basic Attention Token and Chainlink.

### **Helping Households Under Great Stress wants to be “ahead of the curve”**

Helping Households Under Great Stress (HHUGS) was the first Muslim charity in the UK to accept Bitcoin donations to ensure “we are ahead of the curve”, according to the organisation, which supports families impacted by counter-terrorism, national security and extremism related laws.

“We hope through such an innovative currency as Bitcoin that we can open up new avenues for people to support HHUGS and reach new donors and supporters,” it adds.

“From our observation of future trends, it seems likely that we will receive digital currency as a donation at some point and we want to be prepared for that eventuality.”

The charity offers donors the chance to donate using its bitcoin wallet. It is accepting any amount of Bitcoin, from 0.0005 BTC, which is currently equivalent to £20.

### **RNLI offers supporters the chance to donate using Bitcoin**

Another charity to offer supporters the chance to donate using a Bitcoin wallet is the RNLI, which was one of the first in the UK to give



supporters this option.

“Bitcoin is an innovative new kind of currency and we believe that accepting Bitcoin will result in donations we may not otherwise receive, as well as connecting us with new types of supporters,” says the charity.

“Also, from our research into future trends, it looks likely that we will receive digital currency as a donation and/or as part of a legacy at some point and we want to be prepared for that eventuality.”

### **Save the Children reacts to global events swiftly through cryptocurrency**

Among the benefits of cryptocurrency donations is that they can be used by international aid charities digitally and swiftly through blockchain technology.

Save the Children is among the pioneers of encouraging cryptocurrency donations, having accepted Bitcoin since 2013.

It now accepts multiple forms of cryptocurrencies, also including Ethereum, ZCash, Litecoin and Basic Attention Token and uses the fundraising platforms The Giving Block and Gemini Trust Exchange.

According to the global charity: “Adding this emerging donation type is a first step in learning more about how blockchain technologies can help us do more to reach the most marginalized children in the world.”

### **Turing Trust embraces digital currencies**

It is apt that the Turing Trust, named after pioneering computer scientist Alan Turing, has embraced digital currencies. It is accepting Bitcoin and Litecoin donations for its work to help tackle digital exclusion among disadvantaged students in sub-Saharan Africa.

“Cryptocurrencies have grown massively over recent years and we hope that by accepting Bitcoin and Litecoin donations we can engage with a wider audience and receive donations from those who prefer to donate using digital currencies,” says the Trust.

It adds: “We are passionate about our mission to help bridge the digital divide in Africa. As an organisation with such close links to Alan Turing it seems appropriate to engage as much as possible with current technologies for fund-raising and furthering our work.” ■



# How can charities use social media effectively?

**During a challenging time, social media can be a difficult place to be, but it's also an effective tool for change – when used carefully.** **WRITTEN BY** ATHAR ABIDI, HEAD OF SOCIAL &

DIGITAL ACTIVATION, BRITISH HEART FOUNDATION



**S**ocial media is a funny place for a charity brand to be. The thing to remember is that outside of the sector, most people only follow one or two charities, and your place in their newsfeeds is a privileged position.

So, how to make the most of that position? Your content sits amongst their friends, families and favourite celebrities so try to fit in. Don't constantly ask for money. Don't invite them to events all the time. Make them feel good and if possible, smile. Using organic social as a sales channel isn't the way to achieve anything other than an unfollow.

'A post on Facebook' is an item on every stakeholder's checklist and it shouldn't be. Your follower count might be impressive, but your actual reach will be less than a quarter of that. Your average engagement rate? Let's be generous...5%. The numbers don't add up. Organic

social media is nobody's silver bullet when it comes to sign-ups, sales and event registrations. Paid social will allow you to create custom audiences that are driven by insight and your CRM. Organic social is a hail mary for asks that is likely to end up having a negative impact on your organic reach as the Facebook algorithm punishes you for not knowing what makes your audience tick, which is measured by the quantitative success of the post.

This all sounds very negative, I know, and there is definitely a place for asks on your Facebook page, but you have to be selective in what asks are made organically and how. Don't replicate your paid collateral on organic – tell the story and sell the product in a way that looks natural on the newsfeed. Don't suddenly switch to branded assets with professional photography. If it looks like an advert and smells like an

advert, it will be ignored like an advert. The most effective ad blocker is the human mind.

Utilise the full channel mix, be selective, write platform specific copy, make the most of the functionality that is unique to each channel and take the time to get to know your followers on every channel.

Sometimes world events will take over the conversation on social media and knowing whether or not to get involved in the discourse is a constant concern. In these instances, the first thing you need to consider is whether or not there is an expectation from you as a brand to have a view on the matter. Sometimes there isn't. If there is a clear connection between you and that issue lead with that connection, make it clear why your voice is relevant. If you're not sure, wait. See what other brands are doing and what response they are getting. Rushing into contentious debates is rarely a winning tactic.

Charity brands should treat their social profiles the same way that people treat their personal profiles, as a way to present the best, most likeable version of ourselves. Not too needy, not too self-obsessed, just someone you want to stay in touch with. ■

TOP TIPS

# Cyber security: key issues to consider

**While it is tough for third sector organisations to devote time and money to data and IT security, they must prioritise it** WRITTEN BY BRIAN SHORTEN, CHAIR, CHARITIES SECURITY FORUM

Charities are the same as any other organisation when it comes to information security. Large or small they have information assets to protect, problems to deal with, and cyber-security threats to counter. While it may be difficult to devote time and money to information security, charities must juggle reduced resources to protect their valuable data. Here are some tips to get started.

**1. The whole organisation, from board/trustees down, needs to buy into the importance of securing information.** Carry out a review of the company's assets, record the risks to each, and the steps needed to protect them. This risk register should be reviewed by the board and senior management on a regular basis to ensure steps are taken to reduce each risk.

**2. Good technical support is important to ensure the secure running of IT systems.** If in-house support is not possible, make arrangements with a third-party to get the techies to be part of the team.

**3. All software must be kept current and up-to-date with the latest versions.** Regular updates reduce the risk of someone



exploiting a flaky old application to get access to precious data. Don't neglect the I/O devices like the printer and photocopier. It is easy to forget that these have as much computing power as a tablet or mobile, and can connect to the internet for engineering support.

**4. Swot-up on relevant legislation and compliance.** Charities need to ensure they meet all requirements, especially those with a security angle. Start with the Data Protection Act and GDPR on the Information Commissioner's Office.

**5. Use Cyber essentials.** Use National Cyber Security Centre - NCSC.GOV.UK – to produce a checklist to show your level of security, and how you are improving.

**6. All information must be kept safe.** Information, whether safely tucked away in the server room, or going walkabout on removable media such as a laptop or USB stick, must be protected. If it's on the

move, keep it encrypted with a strong password to protect the data should it fall into the wrong hands.

**7. Introduce a process for staff that raises awareness of the importance of securing information.** And make it mandatory for staff to demonstrate their information security knowledge before they are let loose on systems.

**8. Have an incident response team** Despite best efforts, incidents will happen – data will be lost, equipment will fail, and hackers may compromise systems. Have an incident response team, and a practised process in place to manage incidents should they occur.

**9. Striking a balance between liberty and lockdown is important.** Don't let everyone have access to all the charity's data and IT systems. Ensure that the only people who can access the information are authorised and need to do so.

**10. Network with peers.** It is guaranteed that whichever problem you are struggling with is not unique; someone else has dealt with that problem, and moved on. Sharing problems and solutions is a cheap and easy way to help with information security management. ■

# Top five uses of VR by charities

**We outline some of the innovative ways VR and gaming simulation technology is being used in the charity sector. WRITTEN BY JOE LEPPER**

**F**rom 360-degree tours of services to simulating real life experiences, charities are increasingly turning to virtual reality (VR) and gaming tech to bolster their support.

In the case of the virtual reality tours, this is particularly useful for children and vulnerable people to help them better understand potentially daunting healthcare treatment. This can be vital to putting them at ease.

For frontline charity practitioners, virtual reality can help understand the potentially traumatic experiences beneficiaries have experienced and hone their skills to support them.

Here we outline some of the innovative ways VR and gaming simulation technology is being used in the charity sector.

## **Combating anxiety**

The Cornwall branch of the National Autistic Society commissioned tech firm Ocean 3D to create virtual reality tours of venues and services to make them more accessible for people with autism and other “hidden conditions”.

This helps limit feelings of anxiety and fear among people with disabilities when visiting places.

This includes a guided tour of Bodmin Keep, Cornwall’s Army Museum, as well as West Country

Dental Care’s facilities.

Chris Wood, Ocean 3D director says: “VR, with or without a headset, can now be accessed on a smartphone, tablet or desktop, making it an invaluable aid to an almost limitless amount of sectors and roles.

“For many, the ability to journey to a destination plan using real world imagery to explore locations in advance of the journey, in a place they feel comfortable and safe, is absolutely vital to reduce anxieties and build confidence. This person may have autism, dementia, agoraphobia or other hidden conditions or injuries and/or may need to assess whether a mobility device will be suitable for the destination/will fit through entrances.”

The National Autistic Society’s head of campaigns, Tom Purser adds: “For some autistic people, unfamiliar places can be really distressing, especially with busy crowds, bright lights and the anxiety of not knowing where things are - like the toilets, a café or a quiet room.

“Virtual reality technology, like that provided by Ocean 3D, can give autistic people the opportunity to experience the layout of a space before visiting it in real life. This means they’ll have more time to

process the layout and know where things are before they visit.

## **Helping war veterans**

Another 360-degree virtual tour project Ocean 3D has been involved with is a series of virtual tours of support offered by Turn to Starboard, which offers sailing experiences to armed forced personnel affected by military operations as well as their families.

Virtual tours include a guide to the charity’s offices and the yachts used to help explain support to beneficiaries, who may be impacted by brain injuries, claustrophobia and PTSD.

## **Training professionals to support abuse victims**

Children’s charity the NPSCC has linked up with gamification simulation training provider Attensito to launch an online simulation to help adults working with children to better support young victims of abuse.

Called Talk to Me, the aim is to help build up professionals’ confidence to talk to children about challenging issues like abuse.

NSPCC chief executive Peter Wanless said: “For anyone who comes into contact with young people who they fear





may have suffered abuse or be at risk, learning how to build their trust is absolutely vital.

“As part of our wider activity aimed at supporting those who work or volunteer with children, we’re delighted to offer our safeguarding research and experience to collaborate with Attensi on ‘Talk to Me’.”

Social enterprise Cornerstone is another to use VR to help in training professionals helping vulnerable children. It uses simulation technology for its training for frontline care professionals. This aims to give professionals a greater understanding of the impact of

trauma on young people’s lives.

### **Supporting ill children needing medical care**

Another charity to use 360-degree virtual reality tours to ease fears of beneficiaries is Acorns Children’s Hospice. Before children receive treatment, it has created an immersive virtual reality tour of its facilities, including the bedrooms they will stay in, medical equipment and gardens. The tour can be taken using a virtual reality headset to add to the immersive experience.

The same ethos of setting children at ease before potentially daunting healthcare has driven Great Ormond

Street Hospital to offer a 360-degree tour of its wards. This takes in the hospital’s facilities, including surgical theatres.

### **Creating a virtual orchestra**

The heritage and arts sectors are increasingly turning to digital to help reach a wider audience. Among the most innovate is the creation of a virtual live orchestra by the charity Philharmonia.

This uses immersive installations and screens to simulate the experience of seeing a live orchestra. The aim is to diversify classical music’s audience and make it more accessible. ■

# What does the future of work look like?

The Future of Work 2021 report, produced by Blackbaud Europe, reveals what impact the Covid-19 pandemic has had on the way the charity sector operates

WRITTEN BY JON WALDER, DIRECTOR OF PEOPLE, INTERNATIONAL MARKETS GROUP, BLACKBAUD

What impact has the Covid-19 pandemic had on charities and their day-to-day working practices? And as we begin to think about the future, what impact will it have long-term for those non-profits planning their return to “business as usual” strategies? These questions were the driving force behind Blackbaud’s new Future of Work 2021 report, created in partnership with The Resource Alliance. We wanted to support the sector by digging deeper into the long-term impact of Covid-19, surveying over 800 fundraising professionals to find and share in-depth insights on the changes that charities, and the people who work for them, are planning to implement in the next 12 months. We know that, for many, the future feels like an unknown path that we are yet to walk.

Unprecedented is a term widely overused in modern society. Yet the last 12 months is as close to the definition of that term that one might recall. Not so much because of the effect of any single moment, but the cumulative aftermath of a physiological, political, economic, and social pressure that has reshaped our lives. Covid-19 has forced us all to rethink and in many ways reimagine the very essence of how

we live, as our private and professional personas have merged against a previously unimaginable backdrop of change and tension. From that pressure has emerged new opportunities to put people at the center of any organisation, create new working practices, and connect with employees more deeply. However, it has not been without challenge.

Firstly, and perhaps most obviously, our whole work environment has changed. Baby changing stations and attics began moonlighting as temporary offices and standing desks, only it has not been that temporary. Most of us have been working from home for over a year now. Office meetings have been replaced by virtual ones with Webex and Teams now the key environments for collaboration. Ironically, whilst in many ways we’ve never had so much access to each other, keeping everybody truly connected and present has been a challenge. Initially like many organisations, we countered this by increasing our contact points with each other – daily standups, social virtual lunches, town hall meetings, and even quiet, virtual hotdesking (simulating working side by side in an office environment). To begin with, it worked. We were even more

productive and it helped us all to feel in it together. Gradually, as the repetition grew, and the months passed, we realised that giving each other virtual space was as important as seeing a face on a screen. Who knew Microsoft Teams would need social distancing too?

That repetition or Groundhog Day effect meant that helping people find the balance between switching off and leaning in became critical. Naturally, many of our employees initially filled the gap left by other social endeavours with work. One of the great things about our people is the deep sense of passion they feel for doing more good in this world, and there were times where this has shone more brightly than ever. Faster decision-making and team-led agile-based projects saw improved collaboration and a self-imposed onus on performance. However, longer hours and social displacement created a Covid cocktail of burnout, and, like many organisations, we felt how Covid-19 can take the wind out of our collective sails.

It is probably in this facet where Blackbaud has changed and learned the most. Throughout the past year, we have sent out internal surveys and encouraged managers to check-in with their team members. Statistically speaking, our own



experience has been similar to the findings represented in the report - specifically around how the pandemic has affected mental health and the blurring of lines between our working and home lives. To combat this, since March 2020, we have invested a significant amount of time and energy in our wellbeing programs, offering access to holistic wellness sessions that explore topics such as nutrition and exercise, right through to mental health, sleep, and most recently financial too. We have also encouraged teams to shorten meeting times (we all have a lot going on) and have given much more flexibility to how work is performed and assigned.

Throughout this all, we have maintained an acute focus and narrative on wellbeing and as a result, our latest company-wide survey revealed that 80% of all our people strongly agreed that we enable them to balance their personal and working life. Work matters, but health and balance matter most.

There is no greater evidence of this evolution than our new workforce strategy, part of our new 'together anywhere' model. During the height of the pandemic, we asked people across the global organisation how they saw themselves working in the future, and a key takeaway was that whilst people enjoyed the flexibility of working from home, the majority saw a balance of home and office based as the way forward. In our new strategy – which focuses on ways of working in the future, not just the pandemic - nearly all roles at Blackbaud will be either flexible (2-3 days in the office) or fully remote (4-5 days at home), with only about 5% of our population working in the office 4-5 days a week in the foreseeable. A blend of working styles caters to a much broader demographic and will enable us to bring in previously untapped talent into our world, which aligns well with the Future of Work Report finding that almost half of the working population will only apply for roles going forward that

offer flexibility on where and how they work.

On a pragmatic level, what this means for us at Blackbaud is we will now be moving away from an office with fixed or assigned seating. Instead, we plan to have daily 'working neighbourhoods' which will be bookable up to two weeks in advance through an app. Our ambition is that this office change will allow us to have more collaboration spaces and increase the use of technology across teams to fully support an 'anywhere' experience. After all, we have learned what truly binds us is not where we do our work from, but how we do it together.

**You can download the full Future of Work 2021 report today at [hub.blackbaud.co.uk](https://hub.blackbaud.co.uk) ■**

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## CASE STUDY

# Websites: why it always pays to spend a bit more

**“We’ve gone from zero donations, to a growing base of inbound referrals, donations, and people simply wanting to help”**

WRITTEN BY JON SMALLDON, HEAD OF COMMUNICATIONS AND FUNDRAISING, BRITISH HOME

When we unveiled our new website as part of a brand relaunch in 2019, we visualised someone seeing it for the first time on their mobile, knowing nothing about British Home, with five minutes to spare. After that, we’d lose their attention – and potentially their referral. It inspired us to rethink how we were presenting the charity to the outside world, and how easy we were making it for people to use our services.

We’ve always focused on delivering an excellent service for our residents, and strengthening our relationship with donors, trustees and residents’ families. But when it came to projecting this externally, our website simply wasn’t doing its job. On top of this, the back end was almost impossible to update, so the site looked increasingly outdated.

A serious overhaul was required. By spending a little more on a strong, user-friendly website, we built a more functional platform, and a better representation of our charity. Once we did this, the donations started coming in, and we saw a clear uptick in referrals.

## **Making navigating, donating and referrals simple**

If you wanted to donate before the



website relaunch, you would have had to download a PDF and manually post it to our Streatham address. This was possible only after numerous clicks and tedious navigation through various areas, by which time many people simply gave up. So, we started from scratch, removed the majority of pages, and added a ‘Donate’ button. We also introduced a ‘Get Involved’ section, bang in the middle of the homepage. It’s a clear call to action, cleverly sectioned into five additional ways that people can help.

## **Communicating the brand and offer**

Providing clarity around our offer was another area where the previous website fell short. We would receive enquiries from people who understood that we provide care, but didn’t quite grasp the type that we specialise in. This also meant that we weren’t reaching the people who

would benefit most from it.

Our ‘Services’ area now gives people a comprehensive guide to the types of care available, as well as a straightforward explanation of neuro-disability, and our values. They’re easy to find, in plain English, and accompanied by carefully selected imagery and a consistent colour scheme.

Through the redesign, visitors have a crystal-clear understanding of what we do: provide rehabilitation, residential care, respite support, and palliative care that improves the lives of people living with neuro-disability.

## **A website for years to come**

We’re finally receiving appropriate enquiries through the website, because people now understand our charity, and how we can help them.

Redesigning the website was a fascinating, educational and sometimes humbling exercise in identifying what we wanted to project externally – who are we, what do we want to be, and how do we hold people’s attention long enough to make them stick around and see if we are the right home for their loved one? We’ve gone from zero donations, to a growing base of inbound referrals, donations, and people simply wanting to help. ■

## REVIEW

# Covid-19: How have charities accelerated their use of digital?

As part of a new podcast series, Lauren Weymouth spoke to three charities about their accelerated use of technology over the course of the pandemic.

WRITTEN BY LAUREN WEYMOUTH



In October 2019, The Silver Line and Age UK joined forces. The pair decided they would be able to combine their strengths to reach more older people in need and to meet ever-increasing demand. Little did Age UK know, a pandemic was about to hit, and the partnership would be tested to its capacity and forced to adapt to a whole variety of new challenges.

Among these was the challenge of making The Silver Line helpline function remotely; allowing call centre staff to take calls from anywhere in the country, at any time. It had to happen quickly, efficiently and – most importantly at a financially challenging time – it had to be economical.

Age UK was just one of the many charities undergoing digital challenges like this last year, and one of many that sought the support of digital experts to make the process smoother. As part of a new

digital leadership podcast series, I spoke to three charities about their experiences – about adapting to a new and remote world, embracing technology at an accelerated pace; and what the future has in store as we move back to a more physical way of working again.

## Overnight adoption

“There was no time to ease into it and get set up,” Alasdair Stewart, head of national services for AgeUK recalls. “There were lots of laptops balanced awkwardly on small tables, or at the end of beds.”

When the pandemic first hit, Age UK was four months into a large programme of work, which involved assessing how it could deliver on the benefits of the partnership it had initiated with The Silver Line just a few months earlier. “We were looking at how we could use the new scale and reach of our services to deliver more for older people,”

Stewart explains.

But when lockdown began, wider plans for the partnership were halted. Instead, the charity was tasked with the challenge of tackling double the demand at a time when shops were being closed and face-to-face fundraising was taking a huge hit.

“We really saw the impact on our services from the start of March, when the call volumes to Age UK and The Silver Line really increased, as older people were naturally worried and concerned,” Stewart tells me. “The volume of the calls we were getting from worried or older people was simply overwhelming and really quite challenging for our colleagues who were taking call after call.”

“What we also found, was how our decision-making processes had to change. We had to make some really quick decisions. One of those was moving The Silver Line telephony to a virtual call centre product, to make sure we could keep being there for older people. So, lots of trust and faith was being instilled to ensure we were moving quickly and weren’t being bogged down with long decision-making

# Technology

processes.”

The call-centre system used at the time was being operated from the Age UK office in Blackpool, meaning workers needed to be physically present at a time when all government guidance was suggesting people should stay at home. “For the helpline staff in Blackpool, it was a really difficult time,” Stewart says. “They were having to balance their own health and wellbeing (and their desire to stay at home), with the knowledge that thousands of calls from older people were coming in through the helpline.”

With the help of Amazon Web Services (AWS), the charity was able to transition to a cloud-based call centre solution – something that was already being used across other areas of Age UK infrastructure.

“Thankfully, we were able to get our basic telephony set up within Amazon in about 40 minutes and make and answer phone calls. It’s in a web browser, the requirements are really simple and straight forward and given we use other Amazon services, the overall package worked within our infrastructure.”

## A 360 transition

Charities’ responses to digital challenges caused by the pandemic can be split into several camps. There are organisations, like AgeUK, that have been accustomed to digital for some time, but needed quick-fix solutions to enable services to continue with minimal disruption. There are also those that had minimal experience of digital prior to the pandemic and had to learn fast; and then there are those that totally transformed as a result of adopting digital services.

Peace One Day is an example of the latter. The organisation was established by actor and filmmaker, Jeremy Gilley, in 1999 to create an International Day of Peace. The organisation is well-known for hosting international mass gatherings to raise awareness for the day. Peace Day, which is 21 September annually, has been celebrated all over the world in the form of concerts supported by A-list celebrities.

However, due to the restrictions caused by the pandemic, the organisation needed to find a new way to bring people together. “When lockdown happened in March, we’d

just had the 20-year celebration of Peace Day at The Globe with Sting, Ahmad Fawzi, Emeli Sandé, Jude Law and Sir Mark Rylance,” Gilley explains.

“We were approaching 21 years and we were due to celebrate it in September in New York. It was the opening of the General Assembly and it was going to be really interesting. We were prepped, we had the venue booked and we were going backwards and forwards to New York, getting it all ready. And then suddenly Covid-19 happened.”

With the help of tech partners, such as AWS, the organisation quickly pivoted to enable Peace Day to be celebrated virtually. “I thought Covid was going to be a blocker to our plans for September,” Gilley says. “Because there was no way we could plan a live event in the predicament that we all faced. But you can’t give up on peace. So, the only solution was to take the audience out of the equation and focus solely on delivering digitally.”

“What happened as a consequence of that was fascinating. Suddenly we were in a situation where the show that we were creating was much cheaper. I mean much cheaper. The reach was bigger, too, because we weren’t limited to a venue. The data we collected on those who were participating was great too. All of a sudden, you’ve now got a relationship with that person who’s watching. It was unbelievable.

The global broadcast was a huge success, triggering the realisation that Peace One Day could financially not only survive without face-to-face events, but it could thrive, too. “Our entire operation has completely pivoted now, and I don’t think we’ll ever go back to where we were,” Gilley says. “That’s because of some





great insights and learnings.”

### A seamless service

For some charities, the pandemic has been an opportunity to expand on an already well-developed digital journey. James Plunkett, executive director at Citizens Advice, says the pandemic highlighted the charity's resilience, as many of its digital operations had already been well-established.

“I wouldn't overstate how much you can never be prepared for something like [Covid], but the resilience that you get from flexible technologies, such as the cloud, and being remote-first, for example, came into its own in the past year,” he says.

“Not having to be in the office and being able to collaborate very easily gave us resilience. We already had these tools in place; had people used to working collaboratively, working together on documents at distance from each other and that was certainly powerful.

“Back in about 2014/2015, we took, quite early, the decision to be explicitly cloud-first in the approach that we were taking – moving away from any kind of on-site infrastructure. The decision was about liberating ourselves from physical servers, so that the conversations we're having aren't tied down by inflexible technologies or a particular type of technology, or approach.”

Citizens Advice is a huge advocate for the cloud; arguing that by working in a totally remote capacity, it enabled the charity to quickly adapt during the pandemic, but also allows it to quickly step-up in future, too. Joe Udwin, senior product manager at Citizens Advice explains that physical servers have a physical

limit. “But you can build things like auto-scaling into your cloud infrastructure”, he adds, “which means if there is a surge in demand, or something goes wrong with another piece of tech, then other things can automatically step in and make sure that you have a seamless service.”

### Waving goodbye to the word 'digital'

Plunkett argues that by weaving technology seamlessly into the core of every charity, a level of resilience could be built sector-wide, which would enable it to adapt effortlessly in the face of adversity again.

“Around four years after our decision to invest in technology, we were reflecting on the risk that when you invest in technology and you work in technology, there's a risk that you end up putting the technology first,” Plunkett explains.

“The conversations end up being about the technology itself – about the tools or the software that you're using – and you almost end up downplaying the whole purpose of improving the client experience.”

With this in mind, the charity has made a conscious decision to abandon the word 'digital'. “Let's stop putting technology as the name on the tin,” Plunkett argues. “Let's stop calling this digital. Let's start talking about the customer experience, or the customer journey, or the client experience. Technology really then becomes just an enabler of that, becomes almost the second thing on your list, the way that you're delivering that kind of outcome.”

Moving forward, he says it's vital everybody within an organisation understands technology. “It's vital they can work with digital

technology and can understand the value that technology can add to their organisation. No one has a monopoly on technology in our organisation. It should be a part of everyone's role and part of everything the organisation does.”

Simone Hume, nonprofits UK lead at Amazon Web Services hopes other charities will benefit from the learnings of charities, such as AgeUK, Citizens Advice and Peace One Day. “The pandemic meant organisations had to act quickly, collaborate and invent new ways of working,” she says.

“We hope other charities will go on to be inspired by the ways Age UK, Citizens Advice and Peace One Day used cloud computing to maintain their momentum. This is also an opportunity for charities, of all different scopes and sizes to step back and reevaluate the needs of their donors and beneficiaries and how they engage with them.

“Some of the world's most innovative and forward-thinking charities have already moved to AWS to take advantages of the cost savings and off-the-shelf innovation it gives them. We're excited by the possibilities, and stand ready to help other charities to transform their own services and fundraising platforms.” ■

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ADVERTORIAL

# How ethical is investing in technology companies?

**Tax avoidance will be scrutinised as governments grapple with debt mountains**

WRITTEN BY NATASHA LANDELL-MILLS, HEAD OF STEWARDSHIP, SARASIN & PARTNERS

Technology has transformed our ability to communicate. Without it, life would have essentially ground to a halt in the face of lockdowns. Many of us give little thought to the fact that we use at least one of the ‘big six’ technology companies on a daily basis: sending an email using Microsoft outlook via an Apple iPhone; searching for a product (first identified on Facebook’s Instagram), using Google’s search engine, only to buy it through Amazon; settling down to another Netflix blockbuster. It is extraordinary how embedded these companies have become in our daily lives.

But has technology always improved our standard of living? While arguments over ‘screen time’ have become the new normal in family life, the rapid pace of development has created very real ethical dilemmas. Large technology companies dominate more and more markets, control vast amounts of personal data, are accused of treating workers and/or suppliers badly, and are even blamed for contributing to political instability by failing to properly police content.

All these issues raise legitimate questions as to whether technology companies can be classified as ethical investments. One question, though, that has received less attention, but strikes at the heart of

social responsibility, is whether mega tech companies are paying their fair share of tax. As countries grapple with unprecedented debt mountains, the question over who pays will become acute. Large tech companies – which have done rather well from the pandemic – will be in the spotlight. For many, this could be an uncomfortable experience.

While many companies are affected, the technology industry appears to be particularly exposed to tax actions owing to its rapid accumulation of cash, complex group structures, and the opacity over where companies are registering their ‘profits’.

The Europeans have carried out investigations on Apple, Facebook, Amazon and Alphabet (Google), for favourable – and thus illegal – tax deals. In 2019 Alphabet was fined nearly €1 billion to settle a tax fraud probe. This is not a new or localised phenomenon. Elsewhere, the Chinese imposed a \$140 million fine on Microsoft in 2014, demanded unpaid taxes of Rmb452 million from Apple in 2015, and in May 2016 announced plans to reinvestigate its clamp down on transfer pricing as a mechanism to shift profits between jurisdictions and avoid tax.

At first glance, shareholders bear the brunt of these tax claims: what the taxman takes, shareholders give

up. The question is how should investors think about tax risks, and how should they expect their companies to behave?

## **There are dangers in misreading the public mood on tax**

The problem, and thus risk, for companies like Apple or Alphabet is they misjudge public frustration around tax and the determination of politicians to respond.

The biggest miscalculation is to ignore the wider ramifications of tax. This approach leads to a myopic focus on minimising short-term tax. But tax-minimisation, against a backdrop of rising austerity and public welfare cuts (as we are likely to eventually see when government seek to get control over ballooning budget deficits), fuels public ire. The resulting regulatory and political onslaught risks being far costlier for companies than the original tax bill.

## **Policymakers are responding, tax planning requires more political nous**

The strength of the political reaction is already evident in the speed with which the OECD has agreed its Base Erosion and Profit Shifting reform package (which had previously moved forward at a glacial pace); the rapid adoption by the European Union of a comprehensive tax reform agenda to implement the

BEPS package; and the new willingness of governments around the world – including large emerging markets like China and India – to work closely with richer countries to share information. In the US, the Biden administration is looking at ways to fund its enormous \$1.9 trillion stimulus package and \$2 trillion infrastructure programme, and tech companies are clear targets.

Large companies ignore public opinion at their peril. This is not just about being a ‘good citizen’. This is also a matter of business acumen. Aggressive tax behaviour has the potential to impact businesses in the form of fines and demands for unpaid tax, reputational damage, and it has also become a lightning rod for a broader regulatory crack-down that threatens a company’s license to operate.

### **The technology companies are at risk of miscalculating their tax risks**

Technology companies risk underestimating the damage this could have for shareholder capital.

Alphabet has faced an array of tax investigations linked to how it channels profits via its Irish subsidiaries. The US Internal Revenue Service took Facebook to court over \$9billion of unpaid tax linked to its Irish subsidiaries, eventually wound up last year. Amazon has been investigated for unfair tax deals in Luxembourg, and has also been accused of not preventing avoidance of Value Added Taxes on merchandise sold using its website.

Arguably more dangerous for these businesses than the tax claims are probes into anti-competitive practices. In Europe, these have been linked to unfair tax treatment, and



can attract fines of up to 10% of global revenue, as well as demands for the business to split itself up or restructure. Anti-competitive probes are mounting quickly in numerous jurisdictions, with the UK setting up a new regulator specifically to pursue the tech giants in 2021.

Even when tax practices are not linked to other investigations, it likely doesn’t help.

### **A progressive approach to tax will help underpin longer-term success**

Shareholders risk being harmed where their companies have confrontational relationships with regulators.

But it doesn’t need to be like this. The large technology companies that have grown quickly have succeeded because they are delivering products and services that people value. They have taken substantial risks and made large upfront investments, and

their collective efforts have brought the world closer together, and boosted productivity. In short, the ingenuity of tech companies has improved global welfare.

Looking ahead, tech companies will need to show similar business acumen in their approach to a range of emerging societal concerns. Pioneering risk-taking needs to be tempered with greater humility. Growth came with societal blessing. Continued success as large and mature businesses, however, will depend on retaining their social license to operate. A more progressive approach to tax would be a good – and strategic – place to start. ■

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& PARTNERS



## INVESTMENT

Multi-Asset Funds	Investment Manager	Fund Size (£m)	Cash %	Bond %	Equities	
					UK %	Intl %
Barclays Charity Fund	Barclays	236.3	2.3	14.1	36.5	37.6
Armed Forces Charities Growth & Income Fund	BlackRock	398.9	3.4	18.2	23.9	37.1
Catholic Charities Growth & Income Fund	BlackRock	183.6	6.3	15.8	27	33.5
Charities Growth & Income Fund	BlackRock	162.1	7	17.8	29.2	34.7
Charity Multi-Asset Fund	Cazenove	603.4	2.8	9.3	10.7	58.8
Responsible Charity Multi-Asset Fund	Cazenove	245.2	2.8	9.1	-	71
CBF Church of England Investment Fund	CCLA	1789.7	3.4	-	10.2	67.9
COIF Charities Ethical Investment Fund	CCLA	1210.1	4.7	-	9.3	69.3
COIF Charities Investment Fund	CCLA	3417.4	4.1	0.4	9	68.7
Amity Balanced Fund for Charities	EdenTree	23	1.2	24.6	53	21.2
M&G Charity Multi-Asset Fund	M&G	184.1	8.3	8	46.4	33.3
Newton Growth & Income Fund for Charities	Newton	744.1	3.6	14.3	39.2	43
Newton SRI Fund for Charities	Newton	108.1	0.8	12.5	34.6	50.1
Newton Sustainable Growth & Income Fund	Newton	61.3	2.3	13.2	19.2	62.6
Active Income and Growth Fund for Charities	Rathbones	226.7	3.4	16.5	24.6	39.7
Core Investment Fund for Charities	Rathbones	128.7	0.2	7.6	37.5	39.6
Charity Assets Trust	Ruffer	142.8	4.2	36.8	14.6	25.9
Sarasin Climate Active Endowments Fund	Sarasin & Partners	351.3	2.8	14.7	18.4	54.4
Sarasin Endowments Fund2	Sarasin & Partners	1952.6	4.8	13.5	19.3	51.7
Sarasin Income & Reserves Fund2	Sarasin & Partners	175.3	2.3	66.6	9.2	14.2
Waverton Charity Growth & Income Fund	Waverton	13.3	8.6	16.4	10.7	49.2

Peer Group Indices						
Sterling Cautious Charity Index	ARC		20.4	43.8	4.9	10
Sterling Balanced Asset Charity Index	ARC		8.9	25.9	21.4	24.6
Sterling Steady Growth Charity Index	ARC		6.3	19.1	32.5	34.4
Sterling Equity Risk Charity Index	ARC		0	12	45.3	36.6

Market Indices <sup>1</sup>						
UK Equities	iShares					
International Equities	iShares					
UK Sovereign Bonds	iShares					
UK Corporate Bond	iShares					
UK Property	iShares					
Cash	-					

## INVESTMENT

Prop erty %	Other %	Last Quarter	Last 12 Months	YTD 2020	Last 3 Years	Last 5 Years	Last 10 Years
7.7	1.87	8.2	1.6	1.6	14.7	50.7	-
7.2	10.2	7.9	9	9	20.2	53.6	113.2
7.3	10.1	8	7.2	7.2	21.3	53.2	103.7
4	7.3	6.6	10.1	10.1	-	-	-
7	11.4	6.9	7.5	7.5	15.6	42.4	80
4.3	12.3	7.6	8.9	8.9	-	-	-
3.6	14.96	5.3	10.2	10.2	37.4	79.1	172.8
4.3	12.52	4.6	9.8	9.8	34.8	73	157.2
3.9	13.95	5.4	9.8	9.8	34.4	73.3	160.8
-	-	13.1	-2.8	-2.8	6.3	27.9	-
0.2	-	12.3	-3.2	-3.2	-	-	-
-	-	8.3	1.6	1.6	19.1	53.1	133.7
-	2.03	9.3	8.2	8.2	24.7	61.2	112.1
-	2.72	5.7	5.1	5.1	23.1	53.3	112.1
7.1	8.69	7.1	5	5	15.6	45	-
6.1	9.07	7.8	7.5	7.5	18	-	-
-	18.5	6.1	11.8	11.8	13.1	28.7	-
1.6	8.15	6.5	10.2	10.2	-	-	-
2.5	8.08	6.4	9.6	9.6	25.5	53.7	107.6
-	7.68	3.4	7.8	7.8	15.5	32	72.3
2.8	12.3	5.3	11.4	11.4	-	-	-

2	19	3.1	3.6	3.6	8	17.1	42.8
2.7	16.5	6	3.6	3.6	11.6	30.9	68.3
1.8	5.8	7.6	3.5	3.5	13.9	40.4	86.2
1	5.1	9.4	2.3	2.3	13.6	44.3	94.5

10.8	-11.6	-11.6	-5.6	25.7	57.3
7.2	12.2	12.2	34	94	191.6
0.6	8.2	8.2	16	29.8	67.8
3.9	8.9	8.9	17.9	39.3	91.1
13.7	-16.7	-16.7	-8.4	-6.7	79.9
0	0.3	0.3	1.6	2.3	4.9

Source / Asset Risk Consultants

## Key

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

Managing the finances of a charity is rarely a simple task. On one hand, the causes that the charity supports may have complex funding requirements that require the ability both to make short-term awards and to support longer terms initiatives as well as meeting on-going running costs. On the other hand, income sources may be highly irregular as on-going fundraising activities are supported by one off grants, gifts and legacies, the timing and size of which cannot be anticipated.

For many charities, a key component of achieving the aim of matching income to funding requirements is a well-managed investment portfolio. But with ongoing financial repression, to what extent can charities depend on their investments to support their expenditure requirements? By examining the performance of more than 4,000 portfolios in the ARC Charity Indices (ACI) universe, it is possible to consider this question from a historical perspective.

The ARC Sterling Steady Growth ACI index represents the average performance of charity portfolios that had a risk relative to UK equities of 60% – 80% and represents the most common risk profile of charity portfolios. Over the period from December 2003 to December 2020, these portfolios achieved a total return of 194% or 6.5% per annum compound growth. Over the same period, inflation, measured by the consumer price index was 2.1% per annum. As a result, a portfolio of £1 million at December 2003, could have supported annual expenditure of £41,700 (increasing with inflation), whilst maintaining the real value of the portfolio over the period. In

## How to adjust to financial repression

**How should charity trustees prepare for lower inflation-adjusted investment returns over the next decade? WRITTEN**

**BY GRAHAM HARRISON, DIRECTOR, ASSET RISK CONSULTANTS (ARC)**

other words, charities could sustainably distribute just over 4% per annum.

However, looking forward to the next 10 years, how sustainable is such a distribution policy? While the period 2003 to 2020 included several significant drawdown events, including the global financial crisis in 2008 and the pandemic, it was

also a period of relatively low inflation and plentiful liquidity that supported strong equity market returns that may not be repeated.

Our figures show a fairly modest increase in inflation of one percentage point sees the sustainable quantum of withdrawals fall by more than 23% (from £41,700 to £32,300). If combined with a reduction of one percentage point in portfolios returns, sustainable distributions fall 46% (from £41,700 to £22,700).

So, what should charity trustees do about the very real prospect of lower inflation-adjusted investment returns over the next decade? The effects of the unprecedented fiscal stimulus to support economies recovering from Covid-19 are difficult to anticipate but, as concerns mount about rising inflation and the possibility of asset price bubbles, now is the time for trustees to:

- 1) Understand the dependency on investment returns to support charitable aims;
- 2) Discuss the mandate with the investment manager and their outlook for real returns;
- 3) Review the existing distribution policy and consider how best to adjust it over time with long term sustainability in mind. ■







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ACEVO also works hard to ensure its members voice is heard by opinion formers and influencers at the highest level.



### 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)

## BANKING



### Triodos Bank

Deanery Road  
Bristol BS1 5AS

T: + 44 (0)800 328 2181  
E: [contact@triodos.co.uk](mailto:contact@triodos.co.uk)  
W: [www.triodos.co.uk](http://www.triodos.co.uk)

Triodos Bank offers a fresh approach to banking. Our mission is to make money work for positive social, environmental and cultural change.

We do this by only lending money to businesses and projects which benefit people and the planet, including charities and community groups.

This means our depositors know their money is used to make a positive impact, while still receiving a fair return. And the charities we lend to receive informed advice, based on our team's in-depth understanding of how to balance financial and ethical business objectives.

We offer a range of services for organisations of all sizes, including:

- Term loans and overdrafts • Deposit and current accounts • Corporate finance (capital raising)

Visit [triodos.co.uk](http://triodos.co.uk) to find out more.



### Unity Trust Bank plc

Nine Brindleyplace  
Birmingham  
B1 2HB

T: 0345 140 1000  
E: [us@unity.co.uk](mailto: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.**

## 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 2431 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 2431**

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

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## FUNDING



### PayPal Giving Fund

Whittaker House,  
Whittaker Ave,  
Richmond, Surrey  
TW9 1EH, UK

W: [paypalgivingfund.org.uk](http://paypalgivingfund.org.uk)

PayPal Giving Fund is a registered charity (No. 1110538) that raises millions of pounds each year to benefit UK charities. We enable people to give through programmes operated by PayPal, eBay, Humble Bundle and other leading internet businesses. PayPal Giving Fund receives funds donated through these platforms and seeks to grant them to charities recommended by donors.

Contact us at: [info@paypalgivingfund.org](mailto:info@paypalgivingfund.org)

## INSURANCE



### Unity Insurance Services

Suite 8 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/charity-insurance](http://www.unityinsuranceservices.co.uk/charity-insurance)

### 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 us to find out more.

## INVESTMENT MANAGEMENT



### Charles Stanley & Co. Limited

55 Bishopsgate London EC2N 3AS

### Nic Muston - Director of Private Clients & Charities

E: [nicholas.muston@charles-stanley.co.uk](mailto:nicholas.muston@charles-stanley.co.uk)

T: 020 7149 6610

### Robert Winterton - Business Development Executive - Charities, Intermediary Sales

E: [robert.winterton@charles-stanley.co.uk](mailto:robert.winterton@charles-stanley.co.uk)

T: 020 7149 6265

[www.charles-stanley.co.uk](http://www.charles-stanley.co.uk)

### A personal service shaped around you

- We currently manage £24.9bn\* across a broad range of clients
- Of which our Charity team manage £1.56bn\* on behalf of over 800 charities
- We provide a bespoke solution for each client, as well as a direct relationship with a dedicated fund manager
- We use a distinctive investment approach within a robust risk framework as well as offering environmental, social and governance screening
- We work closely with our clients supporting them by providing both policy guidance and trustee training
- With our 20 regional offices we are close by to support your needs

\*as at 31/12/17

Investment involves risk, investors may not get back what they originally invested. Charles Stanley & Co. limited is authorised and regulated by the Financial Conduct Authority.



### EdenTree Investment Management Ltd

24 Monument Street  
London  
EC3R 8AJ

Philip Baker

Head of Institutional Business Development

T: 0800 032 3778

E: [charities@edentreeim.com](mailto:charities@edentreeim.com)

W: [edentreeim.com](http://edentreeim.com)

### Profit with principles

That is 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. This is why these factors are integral to our responsible investment process and why EdenTree Investment Management has won numerous awards for its performance.

Call us to discuss how investing responsibly will benefit your charity, learn how our charitable ownership helps us see things from your perspective and how your investment can make a real difference.

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



### Epworth Investment Management Limited

9 Bonhill Street, London  
EC2A 4PE

Mark O'Connor

Head of Business Development

T: 020 7496 3639

E: [mark.oconnor@epworthinvestment.co.uk](mailto:mark.oconnor@epworthinvestment.co.uk)

### Christian Ethical Investment – for Churches and Charities

We are dedicated to serving the needs of Churches and Charities, currently managing around £1.3bn.

What makes us different is how we do it. Our Christian ethical approach looks to identify sustainable companies with attractive return prospects. We then engage to positively influence their behaviour and ensure they are acting in a responsible way.

For good returns that faithfully meet your ethical requirements, please get in touch.

Epworth Investment Management Limited ("Epworth") is authorised and regulated by the Financial Conduct Authority (Registered number 175451). Data as at 31/12/20.

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## INVESTMENT MANAGEMENT



### M&G Investments, M&G Charities Department

PO Box 9038, Chelmsford CM99 2XF

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

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

With M&G, you're free to choose from two specialist pooled funds for charities, Charifund and Charibond, or alternatively, invest across our wide range of OEIC funds.

We've been managing charitable funds for over 55 years and now look after £1.4 billion\* for charities – making us one of the largest and most experienced managers of these funds in the UK. The value of investments will fluctuate, which will cause fund prices to fall as well as rise and you may not get back the original amount you invested.

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

# NEWTON

Investment  
Management

### Newton Investment Management

Alan Goodwin  
Newton Investment Management  
BNY Mellon Centre  
160 Queen Victoria Street  
London  
EC4V 4LA

T: +44 (0)20 7163 4404  
E: alan.goodwin@newtonim.com  
W: www.newtonim.com/charities

At Newton, our purpose is to help our charity clients fulfil theirs. We are a trusted long-term partner to charities, and have a strong track record of supporting them in achieving their goals through active, thematic and engaged investment. We manage a range of strategies for charities, including charity-focused pooled funds, sustainable funds, and segregated portfolios.

We invest in a way that seeks to deliver attractive outcomes to our clients, and helps foster a healthy and vibrant world for all. And we do not stand still. Innovation is a fundamental part of our service to charities.

[www.newtonim.com/charities](http://www.newtonim.com/charities)

**Your capital may be at risk. 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. This is a financial promotion.**



QUILTER CHEVIOT  
INVESTMENT MANAGEMENT

### Quilter Cheviot

Contact: Charles Mesquita

One Kingsway  
London  
WC2B 6AN

T: +44 (0)20 7150 4000  
E: charities@quiltercheviot.com  
W: quiltercheviot.com

### How do you navigate investment challenges & opportunities?

#### When it comes to investment, we help charities by thinking beyond the obvious.

- Over £1.7 billion of charity assets under management (as at 30/06/2017)
- Support for the sector: charity seminars, bespoke investment training, ethical investment expertise and knowledge guides

Quilter Cheviot Limited is authorised and registered by the Financial Conduct Authority

Rathbones  
Look forward

### Rathbone Investment Management

8 Finsbury Circus, London EC2M 7AZ

For further information please contact  
Natalie Yapp:

E: natalie.yapp@rathbones.com  
T: 020 7399 0128  
W: rathbones.com/charities

*Rathbone Investment Management Limited is authorised and regulated 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

- £6.5 billion of charitable funds under management
- Over 1,900 charities
- Segregated or pooled investment
- Dedicated team of charity investment specialists
- A history grounded in philanthropy

All figures as at 31 December 2020

At Ruffer our offering for charities include:

- Dedicated charity team
- Pooled ethical fund incorporating restrictions
- ESG fully integrated into our investment process
- Segregated or pooled offerings for charities
- Proven track record in producing a genuinely diversified approach for charities

At Ruffer, we have a distinctive approach to investing which we believe is well suited to the needs and goals of charities and their trustees. We focus on delivering 'all-weather' investment returns, protecting and growing the value of our clients' assets throughout the market cycle. This approach has protected and grown charity portfolios through the recent covid-19 market shock.

Ruffer manages £21bn to include approximately £1.5bn for charities.

*Ruffer LLP and Ruffer AIFM Limited are authorised and regulated by the Financial Conduct Authority. Please note that the Charity Assets Trust is an unregulated collective investment scheme (UCIS) available only to eligible charities.*



### Ruffer LLP

80 Victoria Street  
London  
SW1E 5JL

For more information contact:  
Ajay Johal - Investment Manager

T: +44 (0)20 7963 8040  
F: +44 (0)20 7963 8175  
E: ajohal@ruffer.co.uk



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## 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 approximately 433 charities\* with over £6.6 billion in charitable funds\*, representing over 48% 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 £13.9 billion\* (\*as at 30.06.2019).

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 5,000 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.*



### Smith & Williamson

25 Moorgate  
London  
EC2R 6AY

Contact: Sharon Hanshaw  
T: 020 7131 8214  
w: www.sandwcharities.com

Smith & Williamson is an independently-owned financial and professional services group, with 1700 people across 12 principal offices in the UK and Ireland. We are a leading provider of discretionary investment management services to private clients, charities and corporates and have around £20.4bn of assets under management and advice (as at 31 December 2017).

Smith & Williamson LLP is regulated by the Institute of Chartered Accountants in England and Wales for a range of investment business activities. Smith & Williamson Investment Management LLP is authorised and regulated by the Financial Conduct Authority.



### UBS

5 Broadgate  
London EC2M 2AN

Helen McDonald - Director  
E: helen.mcdonald@ubs.com  
T: +44 207 567 0241

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: Isobel Fraser  
T: 020 7484 7485  
E: charities@waverton.co.uk

W: www.waverton.co.uk/charities

### High quality investment solutions for charities

Charities, universities and other not-for-profit institutions have valued the personalised service and high quality investment solutions that Waverton has delivered since its inception in 1986. We understand the complex matters that charities and institutions face. That is why we would work in partnership with you, to ensure that your investments are aligned with your organisation's objectives and aims.

### Waverton offers:

- A dedicated charity team
- An open and personalised service
- Pooled or segregated solutions
- Ethical investing and bespoke screens
- Institutional investment approach
- Trustee training and guidance

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

## PROMOTIONAL MERCHANDISING



### 4imprint

5 Ball Green  
Manchester  
M32 0QT

T: 0800 055 6196  
E: sales@4imprint.co.uk  
W: www.4imprint.co.uk

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## Investing responsibly for your charity's brighter future

As a responsible and sustainable investment manager with a charitable heritage, our specialist funds for charities are designed with you in mind. And, because of our rigorous screening process, you can be sure that your investments will align with your charitable values, whilst protecting your charity's reputation. Be illuminated on how we can deliver profits with principles for your charity.

Find out more at [www.edentreeim.com](http://www.edentreeim.com), email at [charities@edentreeim.com](mailto:charities@edentreeim.com) or call 0800 032 3778

The value of an investment and the income from it can fall as well as rise as a result of market and currency fluctuations, you may not get back the amount originally invested. Past performance should not be seen as a guide to future performance. If you are unsure which investment is most suited for you, the advice of a qualified financial adviser should be sought. EdenTree Investment Management Limited (EdenTree) Reg. No. 2519319. Registered in England at Benefact House, 2000, Pioneer Avenue, Gloucester Business Park, Brockworth, Gloucester, GL3 4AW, United Kingdom. EdenTree is authorised and regulated by the Financial Conduct Authority and is a member of the Investment Association. Firm Reference Number 527473.