

Analysis:

Conservative leadership

What does the Conservative leadership race, and its contenders, mean for charities?

Profile

Caroline O'Connor

The CEO of Migrant Help on fighting for the underdog

Feature:

Accessibility

How accessible is the charity sector and what needs to change?

Opinion:

Secret CEO

An anonymous leader on one of the biggest challenges in the sector – pay

Top dogs

Charity Times research reveals the stark reality of CEO diversity at the UK's top charities

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LEADERSHIP VOICES

"I'm an introvert – quite a rare thing for a chief executive, I think"

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News, reviews, columns

Sector appointments



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Access all areas

It's no secret that the charity sector struggles to be the inclusive, diverse and equitable space it wants or proclaims to be. Yet, simultaneously, the sector has a reputation for being led by progressive and open-minded empathists.

So, to the general public, the perception of the sector is that it is generally a much more inclusive place to work than the corporate world. It's seen as more laid back, friendly and – essentially – open to all. But the reality is that this is far from the case – at least at leadership level.

Over the past few months, *Charity Times* has been researching into the CEOs of the most popular UK charities (as per YouGov research), to understand who is leading the most influential charities in the UK. Our excellent research team worked hard to find information on the CEOs of all of these charities, dating back to 1970, in order to establish trends over the past few decades (read more on p.21).

The results we found were stark. The reality is that while some change is happening on the ground, there remains a huge delay in systemic change at the top. What we're now seeing is that while charities are prepared to put in the legwork to ensure workforces are as diverse as the communities in which they are serving, we're unable to say the same about senior leadership.

Just 2% of CEOs at the UK's top charities over the past 50 years have not been white and a quarter of all charity CEOs have been privately educated – a figure that is higher than the UK average. These are shocking statistics that shows as a sector, much more needs to be done to make senior leadership positions far more accessible and inclusive to people from a range of backgrounds.

While our work is done on this particular report, this is just the start of our work on a wider campaign to help diversify our sector's leaders. We all know the benefits of a diverse workforce: better decision-making, greater creativity and higher innovation (just to name a few). But without demonstrating equity, diversity and inclusion (EDI) at the top (particularly at the most well-known charities), we risk showing workforces, beneficiaries, donors and the general public that leadership is only attainable to a certain type of person. Take a read of the report and let us know your thoughts – we'd love to hear your feedback.



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Subscription Rates (6 issues pa)
From £99 for charities and £499
for corporate companies.
See charitytimes.com for more info.

Printed by Buxton Press
All rights reserved. The views expressed
are not necessarily those of the publishers.

ISSN : 1355-4573

Published by
Perspective Publishing
2nd Floor, 5 Maidstone Buildings Mews,
London
SE1 1GN

www.perspectivepublishing.com

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charitytimes



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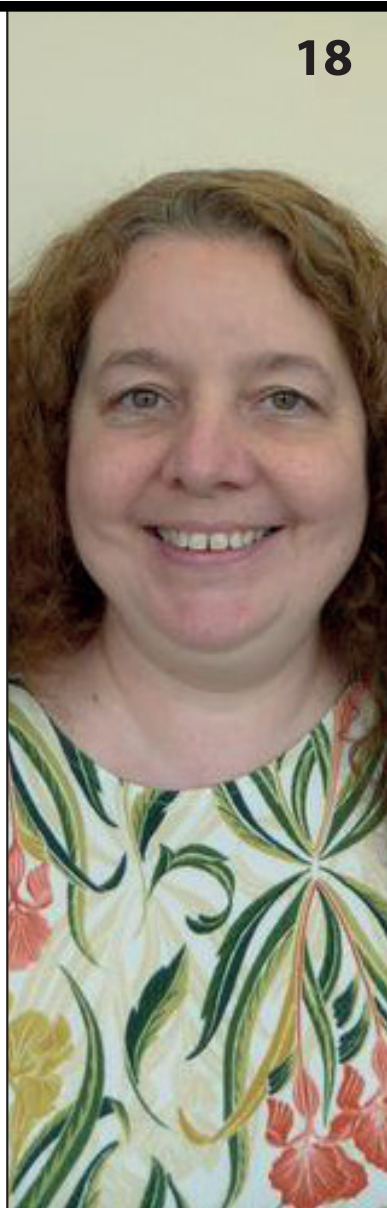


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in brief

CHARITIES OVERTAKE POLICE ON TRUST SCALE

The charity sector has escaped a marked decline in public trust across a raft of professions and groups. The public is more cynical about all professions and groups in society than last year, research has found. But the fall is far less prominent among charities, with the police and politicians taking the brunt of heightened public concern around trust. Doctors remain the most trusted profession with charity workers now in second place, overtaking the police, which was second last year and now drops to third.

FUNDERS PLEDGE ACTION TO BOOST TRADING POTENTIAL OF CHARITIES

A coalition of funders has been formed to boost charities ability to generate income through enterprise and trading initiatives. A focus of the funders will be on improving the distribution of enterprise grants to the



sector to increase revenue from selling services and goods. The Enterprise Grants Taskforce will investigate the current scope and size of the grants and identify good practice. The National Lottery Community Fund, Lloyds Banking Group, London Funders, Power to Change, The Mercers' Company, Voice4Change England and the National Lottery Heritage Fund are initial members of the coalition. information from supporters.

"When people feel the pinch, there is heightened public interest in evidence that people's hard-earned money is being put to good use"

CYBER SECURITY TRAINING SCHEME TO FOCUS ON PROTECTING CHARITIES

The Scottish Government is looking to prioritise charities and public sector organisations through its latest round of funding for cyber security training. Ministers in Scotland have renewed the Scottish Business Resilience Centre (SBRC)'s £500,000 contract to improve cyber resilience through the National Cyber Security Centre's Exercise in a Box programme. This is the third year it has funded the programme. The Scottish government says its focus this year will be on boosting cyber security training in the voluntary and public sectors in Scotland.

PUBLIC INCREASINGLY BACKS FOCUS ON CLIMATE CHANGE

Charity sector messaging and action over the impact of human activity on climate change is increasingly backed by the public. When polled in 2019, 26% of the public thought climate change was because of human activity. But when asked in July the proportion rocketed to 40%. The findings suggest that charities looking to limit the impact on the climate are increasingly being backed by the public. Charity activity to combat climate change includes ensuring the sector's investments are ethical and not supporting the fossil fuel industries.

GUIDE DOGS PLEDGES TO TACKLE 'DISABLING' ENVIRONMENT FOR VISION IMPAIRED STAFF

Guide Dogs has promised to put in place improvements to its "disabling" working environment for staff with vision impairments. The charity has admitted that its "built and digital environments, processes and culture has and can be disabling" for some of its vision impaired team. To tackle this, it has pledged to ensure that accessibility is embedded across the organisation and that staff with impaired vision are provided with "the equipment they need to excel in their role within a reasonable timeframe".

SUICIDE CHARITY TO REBRAND TO BE MORE 'MODERN AND INCLUSIVE'

Survivors of Bereavement by Suicide is to rebrand to be more "modern, inclusive and hopeful" ahead of its inaugural national day of awareness raising later this year. The rebrand will include a refresh of its "logo, colours and tone of voice and how the charity shows up in the world", according to creative agency Impero, which is carrying out the review.

SMALL CHARITIES FACE MORE BARRIERS ACCESSING GOVERNMENT CONTRACTS

Small charities face more barriers than larger counterparts in accessing government contracts, research suggests. A report said that the current bidding process is "burdensome, bureaucratic and resource-intensive – which could be off-putting for smaller charities and social enterprises". One of the biggest issues for smaller charities is the "lack of capacity and confidence in writing bids and responding to multiple tenders". The report also found that most available contracts are low-value and short-term, with some forcing charities into subcontracting relationships.



BLACK-LED CHARITIES OVERLOOKED FOR LARGE SOURCES OF FUNDING

Black-led charities believe that they are often overlooked and excluded from applying for large sources of funding, a report has found. The study, produced by GiveBLACK in partnership with UCL, found that Black fundraisers feared that the increase in giving to Black community organisations that followed the Black Lives Matter movement will not last as the publicity fades. It also found that while many wealthy Black donors feel driven to support underserved communities, they need a vehicle to help them connect with worthy Black causes and to network with each other.

RARE DISEASES NURSING NETWORK HANDED CHARITY STATUS

A network of nurses with expertise in treating rare diseases has had its application to be a registered charity approved by the regulator. The Rare Disease Nurse Network (RDNN) formed as a group six years ago. To coincide with the announcement it has issued a call for more volunteers, experienced trustees and advisers with expertise in rare diseases to get in contact.

COALITION CALLS FOR END TO 'VICIOUS CYCLE' OF SPENDING CUTS

Spending on early support for disadvantaged and vulnerable families has halved over the last ten years, according to a coalition of children's charities. This is creating a "vicious" cycle where families are more likely to reach crisis point. Charities including NSPCC, Barnardo's and Action for Children have commissioned research by think tank Pro Bono Economics into the extent of cuts to early help offered by the voluntary sector and councils.

ADMINISTRATORS CALLED IN AFTER FINANCIAL PROBLEMS AT GOODBOX

Board room disputes and Covid's impact on charity finances have been blamed for financial problems at GoodBox, the tech for good company that supplies contactless payment technology to charities. The High Court has appointed administrators to work with company The Good Box Co Labs Ltd on a restructuring plan to allow it to survive and secure further funding. The company says senior level disagreements amid the financial fallout from the Covid pandemic have hindered efforts to secure additional funding.

NOWZAD CLEARED BY REGULATOR

The Charity Commission has cleared Nowzad of wrongdoing around its evacuation of staff and animals from Taliban controlled Afghanistan. Concerns had been raised that its objectives had not been made clear to donors around its Operation Ark mission, to rescue animals and staff after the Taliban took control of Afghanistan. But the regulator has concluded its investigation saying that the charity's objectives were clearly detailed.

SMALL CHARITIES SPEND MORE THAN A THIRD OF GRANT INCOME ON APPLICATIONS

Research conducted for the Law Family Commission on Civil Society has found 'inefficient application processes' mean the sector is spending at least £900m each year on grant applications alone. The study highlighted the high number of funding applications, which are ineligible and unsuccessful, as well as finding many processes 'unnecessarily laborious'. It found small charities spend 38% of their total grant income on fundraising applications, while medium charities spend 35%. Large charities spend 16% of their grant income on the application process each year.

TRUSTEES IN WALES ENCOURAGED TO USE £12M OF DORMANT FUNDS

The Charity Commission and Community Foundation Wales is calling on trustees to come forward and seek support to unlock £12m of dormant assets. The Revitalising Trusts Programme, urges trustees of inactive charities to come forward for support to put their charitable funds to good use. It will support trustees to release inactive funds, redistributing these to good causes across the country through Community Foundation Wales or "breathe new life" into a charity.



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 to select the appropriate package for you.

Or reach out to Shannon.Woods@CharityTimes.com to find out more

Trustees and other senior charity workers have raised concerns over a decline in the quality of support they are receiving from the Charity Commission when reporting serious incidents and seeking advice on regulatory matters.

Concerns are also raised around the regulator's "overly complex" guidance and delays returning calls and emails.

In addition, many charity leaders want the Commission to ensure it makes its staff available to speak to charities over the phone when they have a query, according to a survey of charity leaders.

While 72% respondents said the Commission's service for reporting a serious incident was good or very good in 2020/21, this proportion fell to 64% in 2021/22.

Over the same period the proportion rating the regulator's support for applying to register a charity fell from 83% to 77%.

The proportion of callers rating the Commission's support when needing a query answered or seeking advice as good or very good also fell sharply over the last year, from 73% to 65%.

In contrast customer satisfaction with the quality of the regulator's online advice and information on its register has improved over the last year.

Overall, when prompted, charity leaders who had called the regulator said that most services have stayed the same.

"Although a significant minority point to some improvement," warns a report into the survey's findings, carried out by Yonder for the regulator.

'Overly complex'

This includes concerns that the "terminology is still sometimes found to be overly complex or legal in nature and not aimed at ordinary people".

Also "when email communications are mentioned, it is often in the context of slow responses or not receiving a response at all".

"Some feel the process of contacting the contact centre or email queries can take far too long, leaving them confused

Charity leaders raise concerns over worsening support from the regulator

DELAYS IN RETURNING CALLS AND 'OVERLY COMPLEX' GUIDANCE ARE CAUSING LEADERS TO FEEL LESS SUPPORTED BY THE REGULATOR, A SURVEY HAS FOUND.

WRITTEN BY JOE LEPPER



or unable to resolve their issue," adds the customer satisfaction report.

Other concerns are "impractical" advice and a "one size fits all approach" that ignores the needs of specific charities.

Charities are keen to be able to speak to an advisor or case worker but this is proving difficult, according to the survey.

Website functionality can also be improved, with respondents reporting they are struggling to navigate it.

"Remember many of us are not professionals, we don't have sector knowledge and expertise," said one respondent.

"That's what we come looking for! Just expecting us to do everything right is not helpful, we want to be told and/or shown how in basic simple language."

Another described the Charity Commission's website as "exhausting and feels like a minefield" adding "it needs to be simplified big time".

Yonder's survey involved more than 1,100 participants, taken from the regulator's database. More than a third are trustees, a quarter are charity chairs and a similar proportion are treasurers.

According to the Charity Commission's latest annual report it answered 73,878 calls through its contact centre in 2021/22, 14,000 more than the previous year.

It aims to answer all calls with 120 seconds. The regulator says that over the last year it has answered 84% of calls within this time, up four percentage points on the previous year. ■

Charity leaders are warning of mounting pressures on demand for their services and rising bills across the sector caused by a further worsening in the cost-of-living crisis.

The warning has been delivered as latest figures show (at the time of print) that inflation is now at 9.4% – the highest rate in 40 years.

The cost-of-living crisis is already “fuelling spiralling demand for charities’ services”, which is being “exacerbated by challenges recruiting and retaining staff”, Pro Bono Economics economist Jamie O’Halloran has warned.

“While the government’s attention is focused on the battle to be the next PM, charities, and the people they support, face little respite from the mounting pressure. The next government should be prepared to work closely with the sector to weather the cost-of-living crisis for as long as it lasts.”

Meanwhile, Alison Taylor, chief executive of Charities Aid Foundation’s Bank and Charity Services, says most charity leaders are “concerned about how they are going to pay for their own utility bills, with rent, energy and fuel increasing”.

She warns that inflation is set to increase further this autumn.

“In the charity sector, the impact of this is evident in the increasing number of people turning to services for support – from food banks, mental health and disability support to organisations offering financial guidance,” she said.

“For many charities however, their resources are stretched after two years supporting their communities throughout the pandemic, and they are also having to find the funds to pay higher costs.”

Taylor calls on the government and private sector to support charities through the current cost of living crisis, as they did during the Covid pandemic.

She added: “We urge the Government to look at this issue in detail to understand the multitude of ways in which charities are impacted and consider measures which could help.”

Charities services face ‘mounting pressure’ as inflation hits 40-year high

THE COST-OF-LIVING CRISIS IS TAKING ITS TOLL ON CHARITIES, LEADING TO CALLS FOR SWIFT FUNDING TO HELP THE SECTOR SURVIVE

WRITTEN BY JOE LEPPER

Impact on volunteers

A number of areas of the charity sector have already been severely affected by the cost-of-living crisis, including transport led by volunteers.

Campaigners have warned that those giving up their time for community transport schemes are being forced to give up volunteering as current mileage rates do not cover rising costs at the petrol pump.

The group, including the National Council for Voluntary Organisations (NCVO) and the Community Transport Association (CTA), wants the Chancellor to increase the Approved Mileage Allowance Payment (AMAP), which is the maximum level at which volunteer drivers can be reimbursed without any impact on their tax obligations or benefit entitlements.

The AMAP rate of 45p a mile was last reviewed a decade ago. Its value has reduced even further in recent months due to soaring fuel costs following Brexit and Russia’s invasion of Ukraine.

“Our members are reporting that volunteers are leaving their roles due to the cost-of-living crisis and soaring fuel costs,” said Jen Reston, chair of another of the coalition’s members the Scottish Volunteering Forum.

“This is making volunteering unaffordable for people which is not acceptable. It then impacts on the ability to deliver services, meet commitments, and support those in need of services.

“No volunteer should be out of pocket for volunteering. Volunteering cannot be an activity that can only be accessible for those who can afford it. This will further exacerbate inequalities in our communities.

“Volunteering has to be accessible for all and the mileage rate reviewed and increased, to ensure that vital services can continue.”

Foodbank crisis

Food bank charities are also being advised to brace themselves for further increases in demand for their services as the cost-of-living crisis worsens.

The survey found that more than one in ten (12%) people

have friends or family facing food poverty, which is defined as struggling to buy enough nutritious food for their family or having to use a food bank.

A quarter (26%) know people struggling to pay their bills and for petrol or diesel. A fifth say they have friends or family experiencing fuel poverty.

Food bank services will need extra funding to not only meet demand but also to tackle their own soaring costs, the figures suggest. However just 4% of those surveyed said they have donated to food banks over the last month, with a median average of £10 given.

“The cost of food is increasing rapidly around the world and is set to worsen over the next few months,” said Alison Taylor, chief executive of CAF bank and charity services, which has published the survey.

“For those that can, we would encourage putting a few extra items in your basket for the growing number of families who rely on food banks. There are usually donation points in supermarkets or local collection services.”

“In addition to keeping up the food supply for the increasing number of people who are relying on them, food banks are also seeing their own bills go up with the cost of fuel and utilities.”

Swift fund support

A think tank has previously argued that the current cost-of-living crisis poses as big a threat to disadvantaged communities as Covid-19 and needs a similar response from philanthropists to swiftly fund support.

The call has been made by think tank New Philanthropy Capital, which said “now is the moment for philanthropists to get on and give” as rising inflation “is as big as Covid, possibly bigger”.

“We need the kind of mobilisation that we saw at the start of the pandemic,” said NPC. “Now is not the time to watch and wait. Destitute people can’t wait. If funders aren’t thinking about the cost-of-living crisis, then they’re doing philanthropy wrong.”

To help funders act, NPC has produced a guide for the philanthropy sector highlighting the most impacted communities and challenges charities are facing to support them.

Advice in NPC’s *Confronting the cost-of-living crisis: How funders can mobilise* guide includes increasing the size of grants and the speed they are handed out based on talking to grantees about how inflation is impacting on them.

Simplified applications are needed, to help get money to charities quickly. Funding should also be unrestricted to give charities the flexibility to meet the needs of their beneficiaries.

Funders also need to consider whether their focus of giving needs to change. For example they need to talk more to



community foundations and councils around place based giving.

“Life is getting more expensive for everyone, but for the poorest, for whom money was already tight, the crisis is existential,” said Naomi Chapman, an NPC consultant who is among authors of the guide.

“The poorest households spend a larger proportion of their income on items for which prices are rising fastest, and there’s very little they can cut back on.”

“Over two thirds of poor households are in work, and more than half of Universal Credit recipients are still in poverty even with the taxpayer’s help.

“Of course, the government should do more, but right now with both work and welfare failing to solve the problem of poverty, philanthropists must step in to prevent needless hardship.”

She added: “Meanwhile the same factors which make life harder also constrain the charities and volunteers who try to help. A rise in the price of food, energy, and petrol is a big problem if your charity helps feed, house, or transport people.

“Funders therefore need to give more and give flexibly if they’re to achieve any impact.”

NPC also warns funders against focusing on financial education which “is not the answer” to helping cash strapped families cope with rising inflation. It points out that “put simply when you have little, you get very good at knowing where it goes”. ■

People on the move...

The latest appointments from around the charity sector

If you have any appointments to announce please contact melissa.moody@charitytimes.com



CHARLES HACKETT

Dorset and Somerset Air Ambulance has announced the appointment of Charles Hackett as their new chief executive officer, following the retirement of Bill Sivewright. He joins the charity from Destination Plymouth and Mayflower 400; a five-year transformative programme for Plymouth. Previously he spent 17 years at GlaxoSmithKline in a variety of roles.



DANIEL CHEESMAN

Children's hospice services charity **Jessie May** has appointed Daniel Cheesman as its next chief executive. He replaces Chris Roys, who is retiring after leading the charity after 17 years. Cheesman joins Jessie May in August from Bristol based disability charity Paul's Place, which he has led for the last three years. He is also a former CEO of Brighton charity Switchboard.



GINNY IDEHEN

Ormiston Families, has announced the appointment of Ginny Idehen as head of business development and partnerships, in a new role for the charity. Idehen, who has previously held leadership roles for the likes of Suffolk Mind and West Suffolk College, has a "long record of success" in the areas of income generation and partnership creation.



OWEN JACKSON

Owen Jackson has been appointed to the position of director of policy at **Cancer Research UK**. He will report to executive director of policy, information & communications, Ian Walker. He joins Cancer Research UK from the Government Office for Science, where he worked as deputy director for global issues and Opportunities.



ROBERT KENT

The **Pets at Home Foundation** has appointed Robert Kent as Chair, taking over the role from Louise Stonier, who has had the role 15 years. He joined Pets at Home in 2018 as chief data officer. Since joining the group, he has created a data and analytics capability from scratch, "underpinning the business' strategy to use data to better serve customers".

Appointments



IAN GAMBLES

Ian Gambles has been appointed to the board of trustees at **The Ernest Cook Trust**. Gambles joins the trust after eight years at the Forestry Commission, where he held the position of CEO. He is currently chair of the James Hutton Institute, a member of the Board of NatureScot and a fellow at the Chartered Institute of Management Accountants.



GRAIHAGH CRAWSHAW-SADLER

Bookmark Reading Charity has appointed Graihagh Crawshaw-Sadler as CEO. Crawshaw-Sadler joins Bookmark from Teach First, where she has spent the last 13 years as a director, most recently as director of strategy and learning. She is a former teacher and charity senior leader with 17 years' experience in the education and charity sectors.



JANE IDE

Jane Ide has joined **Reach Volunteering** as its new chair of trustees. Ide is CEO of ACEVO, and previously held the role of CEO of NAVCA, the body for local voluntary sector infrastructure in England. She is also a trustee of the Access Foundation for Social Investment, and was awarded an OBE in 2021 for her services to charity and to volunteering.



SAEED ATCHA

Migrant Leaders has announced the appointment of Saeed Atcha to its board of trustees. Atcha is the founding chief executive of Youth Leads UK, a charity he established aged 15-years-old. Migrant Leaders is a charity programme delivered by The Fardad Foundation working with high-potential young migrants to help them into successful careers.



SIMON TOYNE

Simon Toyne, former resident of the Music Teacher's Association and contributor to the Government's Expert Panel for the new National Plan for Music Education, has joined the **Hamish Ogston Foundation**, as its music project director. His appointment comes as the foundation seeks to expand the reach of its music initiatives.



DOUGLAS FLINT

Douglas Flint has been appointed as the new chairman of both **The Royal Marsden NHS Foundation Trust** and **The Royal Marsden Cancer Charity**. Flint, who has been a trustee of The Royal Marsden Cancer Charity since 2017, will succeed the current chair Charles Alexander at the expiry of his six-year term of office in November 2022.

Diversity

"ACKNOWLEDGING A NEED FOR CHANGE IS THE FIRST STEP TOWARDS ACHIEVING IT"



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

It was an historic eight goal victory for England last night as the Lionesses secured their place in the quarter finals. But all starting 11 players and the five substitutes that came on to the pitch were all white. And that does point towards a lack of diversity in the women's game in England."

These were the words of Eilidh Barbour, commenting for the BBC on the Lionesses' amazing victory over Norway, securing them a spot in the quarter finals of the Women's Euros (which, unless you've been in a bunker with no Wi-Fi, you will know England went on to win).

Cue the inevitable: "Their skin doesn't matter: they picked the best players for the team". And that old tune: "You're being racist against white people". According to press reports, the BBC received more than 200 complaints about Barbour's comments.

First things first, kudos to Eilidh Barbour for being brave enough to use her platform to make the statement just after England's outstanding win. Normally commentators would be trying to outdo each other in how ecstatically they celebrated the win, not using the opportunity to highlight an uncomfortable truth. And Barbour's social media response after the criticism she received was graceful and calm, welcoming the fact that "the conversation is happening".

However, the angry reaction of Barbour's critics highlights how far we have yet to to recognise what bias and discrimination look like; to see that racism doesn't always show itself in the ugly, overt language and behaviour that most of us deplore; to understand that it is not always the best people who get the top jobs, but those who can get through the bias barriers of those hiring them.

To be fair to Football Association Director of Women's Football Baroness Sue Campbell, she acknowledged in various interviews the need for meaningful change to identify the talent that exists in diverse communities. However, she felt that at the elite end of the women's game, it could take years to become more diverse.

Acknowledging the need for change is the first step towards achieving it, and Campbell's public statements are very important. However, as my other half pointed out, we've actually gone backwards, with previous England Women's football teams being more ethnically diverse than the 2022 squad. So what happened?

The Premier League has given the Football Association £5.25 million over three years to fund a new network of 60 Emerging Talent Centres (ETCs) for girls' football, which the FA says will provide high-quality coaching to 4,200 girls aged eight-to-16 by the end of the 2023/24 season. This would be an increase on the current figure of 1,722.

Sounds good. Until you do the maths. The £5.25 million works out at less than £30K per year per ETC. Being more accessible and becoming more inclusive are just two out of five areas of change that will have to be funded out of this £30,000. If you assume that the money will be split evenly across the five areas, that means just £12,000 will be spent per centre per year to create that diverse talent pipeline Sue Campbell talks about. Diverse people may well benefit from the outcomes of the other three priority areas, but still... No wonder Campbell thinks it will take years to see a more diverse line-up in the elite end of the game.

According to the Professional Football Scout Association, the average weekly wage for a Premier League footballer is £60,000 a week – not a year, a week - with top ranking footballers taking home a weekly pay packet of several £100,000. Hmm... at that rate of investment, while it might take time to address issues around the talent pipeline, recognising and addressing discrimination in all its forms could and should happen now. It just takes a willingness to listen, learn and accept the need to change the way we think and behave in ways that genuinely allow people with different identities to step into their talent and thrive, whether that's in football or in sectors like ours.

Stakeholders

"IF WE DON'T LOOK AFTER SOME OF OUR MOST VALUABLE, POWERFUL STAKEHOLDERS, WHAT WILL THEY THINK AND SAY ABOUT US?"

Like many organisations, at CFG we spend time thinking about who our stakeholders are, in relation to different pieces of work. That could be for a specific project or in relation to some aspect of our 'business as usual.' Many of you will be familiar with plotting stakeholders on a power/interest grid.

As well as having a high level of interest in what our organisation is doing, our people – staff and volunteers – have a high level of power. A single tweet about dissatisfaction at work or a poor volunteering experience can blow up in hours, having a massive impact on reputation. Workplace muttering can be detrimental to productivity; reviews on Glassdoor can have a negative impact on recruitment. Our people are in the stakeholder relationship category to 'manage closely' and rightly so; the potential risk of not doing so could destroy the organisation and damage trust in the sector as a whole.

I suspect that, pre-pandemic, many organisations focused on external stakeholders, whether in relation to influencing work or marketing. Internal communication could be seen as the poor relation, relying on the staff meeting, the monthly newsletter and mostly on office chat, overhearing colleagues' conversations or being called into meetings only because you were passing the door and someone spotted you!

But now we are adapting to hybrid and remote working across the sector, particularly for staff formerly based permanently in an office, we can't take organic internal communication for granted.

Now is the time to ensure that internal comms are positive, proactive and planned – to ensure everyone in your organisation feels connected and up to speed on what's going on, wherever and however they are working.

The CIPD's 'Health and wellbeing at work report 2022' states: "The impact of the past two years on people's health and wellbeing can't be overestimated. At the same time, this

unprecedented period in our working lives has also presented opportunities: it's proven how fundamental employee wellbeing really is to organisational resilience [...] We need to hold on to these learnings to improve wellbeing practices and working lives now and in the future."

I'd argue that effective internal communication plays a key role in managing our relationships, maintaining strong and positive connections, and contributing to the wellbeing of our people.

The NHS talks about the five ways to wellbeing: connect, learn, give, be present and be active. Good internal communication can influence our people on all these aspects, as well as demonstrating our commitment to their wellbeing and fostering organisational resilience. It also makes good economic sense for organisations to invest in the mental health of our people.

Research by Deloitte shows that for every £1 spent on staff mental health, the organisation sees a £5.30 return. Since the start of the year here at CFG, everyone has participated in mental health awareness training and we've also supported our first mental health first aider to become qualified. We've held 'tea and talk' sessions which even over Teams have been really enjoyable!

We're working with our people to develop their role profiles, drawing out the connection between every role and our strategic objectives, so everyone knows that what they do makes a vital contribution to the impact we have. We've scheduled our second wellbeing week for the middle of August, with the whole team using this time away from work for R&R.

After all, if we don't look after some of our most valuable, powerful stakeholders, what will they think and say about us?

I'd love to know what you think about the issues I've touched on here – please feel free to drop me a line. But remember, I won't be picking up my emails during our wellbeing week!



DR CLARE MILLS
IS DIRECTOR
OF POLICY AND
COMMUNICATIONS
AT THE CHARITY
FINANCE GROUP

Secret CEO: “If charities want to attract and retain talented leaders, they need to pay and treat them fairly”

This month, our secret CEO talks about one of the biggest issues in the sector – pay.

Folks, the banging pots and pans of recognition and the fuzzy feeling of delivering societal good, isn't going to help people weather the cost of living crisis, or pay their energy or food bills.

At a time when the charity sector is plugging the gaps of the public sector more than ever, charity leaders are working tirelessly to deliver more.

Trouble is, those same leaders are, on average, paid significantly less than their private sector counterparts.

In 2021, a survey of 450 charity leaders by Ecclesiastical found that 44% had considered quitting during the pandemic as a result of the increased pressures. There's little to suggest this has improved.

An added cherry on top is a £2bn wage gap they can collectively expect over the next two years due to inflation and a looming recession. It's worth mentioning that we're not just talking about those at the 'top', 17% of charity workers in general earn less than the real living wage.

Am I sounding gloomy? Well, perhaps. A lot of public attention is given to the salaries of the CEOs. But small to medium-sized charity

CEOs in particular can expect to receive a basic pension and holiday allowance, and work well beyond the hours of 9am-5pm. A CEO's workspace will extend beyond the office, to the kitchen whilst cooking, the car whilst waiting to pick up the kids from school, or the bathroom ... Well, you get the point I'm making!

CEOs are expected to be overnight experts in just about everything. The role is demanding, multifaceted and relentless. Whether its mastering TikTok, developing marketing campaigns, wooing corporate clients, writing grant applications, understanding emerging fundraising channels, developing strategies, being GDPR gurus or acting as accountants, we're walking department stores desperately trying to work multiple till systems.

Having been in the unique position of sitting as a trustee, and now being a CEO, I can see what a fractious and difficult relationship this can be on both ends of the scale.

Though not always the case, CEOs can feel under-supported by their board, as I saw. On one occasion a CEO had an emotional breakdown during a trustee meeting

due to a toxic relationship, whilst in the case of another, they had a board who never turned up to meetings, let alone provide them with support.

The point I'm making here is that the role of a charity CEO is bloody tough and can at times feel thankless. And for those who've written grant applications, we know that getting funding for core costs, like salaries, can be hard, particularly if for living wage rates.

I'm fortunate to have a supportive team around me, who understand the importance of fairness and sustainability. But we have to chip away at negative views and the culture that is making it difficult for CEOs to be lifelong, valued leaders. Appreciation and slaps on the back cannot replace a remuneration that is proportionate to the job in hand.

I regularly see CEO vacancies with salaries that sit 25-30% below the market averages. In what other industry would that type of disparity be present?

We should all take note, know our worth and work hard to make working environments across the third sector better, fairer and fit for the future. ■



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Profile: Caroline O'Connor



“The wrong place at the right time”

CEO OF MIGRANT HELP, CAROLINE O'CONNOR TELLS MELISSA MOODY HOW A WRONG PHONE CALL CHANGED THE COURSE OF HER CAREER, COMPETING AGAINST THE BIG BOYS AND FIGHTING FOR THE UNDERDOG.

recruitment consultant who was trying to reach my accountant and he said: ‘Oh I heard of a job today that would be perfect for you.’. From that call she moved into the charity sector and education. “I think it’s one of those things where fate puts you in the wrong place at the right time, and it just fit with how I felt at the moment.”

That was in 2005, and since then she’s been fighting for the underdog. From Philadelphia, where the Rocky Balboa story originated, O’Conner explains that fighting for the underdog is almost a part of her DNA. “I’ve worked in academy schools, the worst schools in the country; I’ve worked in children’s hospices with kids who have terminal illnesses and don’t have future, with their families who are coping with that. Now I’m working in the asylum and refugee sector, fighting for the underdog.”

Playing against the big boys

Before O’Connor started in the role, the charity was in the process of bidding for a government asylum contract, so as part of her role, and in her previous position as COO, she had to get the charity in a place where they could handle that. This involved making sure it had good policies and governance in place, good computer systems, data security and an understanding of how to operate in a corporate competitive environment, as well as being a charity. She became CEO just as the charity won the contract and it started, and six months into the new contract, the pandemic hit.

“It hasn’t been a slow, steady period since I joined,” O’Connor jokes, “but it’s been really

Since being appointed to CEO of Migrant Help in January 2020, Caroline O’Connor has faced a number of challenges, from the controversy and growing hostility surrounding migrants within the UK, to the government’s plans of deportations to Rwanda. O’Connor didn’t originally intend to work in the charity sector; she trained as an accountant and worked in a number of private sector companies, moving to the UK in 1996. Eventually she was headhunted to do leadership training, moving into general management, which she enjoyed. “But then I got really frustrated because the men and women on the shop floor weren’t rewarded in the same way as shareholders and senior executives,” she explains. That’s when a wrong phone call changed things.

“I got a wrong number phone call from a

exciting, truly invigorating... I do joke with the chair, though, that the job is nothing like she described it when they first recruited me.”

But winning the contract against big private and data companies has been a massive achievement for the charity. “Winning allowed us to keep our integrity, and we were determined that we wouldn’t be cheaper because we digitise things, that face-to-face support is just as important as cost savings,” she explains. “We were persuasive enough to show that a charity could play in that playing field with the big boys.”

Due to the nature of its work, throughout the pandemic, the charity kept up many of its services. It ran a phone line, which it kept up, and ran face-to-face services for those who needed it. To “some degree” its staff transitioned to home working, but it wasn’t possible for everyone.

“We actually grew throughout the pandemic because asylum seekers were still arriving,” she explains, with the growth attributed partly because during the pandemic, the system meant that people couldn’t be returned to the country if they were unsuccessful.

“We maintained services throughout outreach too,” she adds. “Nobody who needed to reach us was left without help... it would just be a slower process.”

In the time since the peak of the pandemic, the charity, like many, has been transitioning. People are coming back into the office in a hybrid setting and attempting to find a new work-life balance whilst still meeting its contractual demands. This is in a time when migrant rights are increasingly under scrutiny.

“It’s always been difficult,” O’Connor admits. “But I think public support of asylum seekers and refugees ebbs and flows but there is always the largest cohort of people who care about other people. And it may be that the loud voices or the negative voices are the people saying things about asylum seekers, but that’s not how the general public feel.”

The charity, she feels, has a challenge in changing the narrative, one that has only increased recently. Good news and positive stories need to be amplified for the charity to do

its work, particularly following the recent events in both Afghanistan and Ukraine, and their knock-on affects across the world.

“We have to almost prepare for the unexpected and unpredictable, which has been really difficult,” says O’Connor. Focusing on the positives comes back to some leadership advice she’s been given. O’Connor says that the best thing that she’s been told is: ‘Nobody remembers your mistakes as much as you do.’ “You spend so much time worrying about what you did wrong and it stands out more to you than anyone else,” she adds.

“I think I spent a lot of time early in my career worrying about the mistakes I made instead of moving on to the next thing. So that was some of the best advice I had.”

Of course, having a government contract doesn’t mean that the charity doesn’t speak out against government policies affecting asylum seekers. “I think we have to be mindful about what we say and think about what we’re saying, but seeking asylum is a human right, and people don’t disagree; the government doesn’t disagree.” But you have to speak factually, she emphasises.

Remain compassionate

Like many CEOs, O’Connor’s favourite part of her role is the people she works with. The charity often employs people who have experiences in the asylum system or are migrants themselves “and you see how much they care.”

Employing people with lived experience is a great part about her work, and the sector, she says. “I’ve worked in children’s hospices before and education before that and there’s something very different in this sector. There are a lot of people who have lived experience so we’re very interested in client voice and co-production of our services within the sector and you don’t see that much in schools or healthcare.”

Having people at the heart of her work is integral to her style of leadership. “We’re all humans, we’re all fragile, and we shouldn’t think of our clients as asylum seekers as victims, but people.”

Despite her experience, O’Connor hasn’t



always felt like she should be a leader. “I struggled with whether or not I was CEO material because I’m not a fundraiser, I’m not a salesman, I’m not a really outgoing type of person,” O’Connor admits. “But I can be tough and I can do the tough stuff and that comes from being an accountant and seeing how the numbers tie in. But I also have a real soft spot and I think that’s really important, to have that compassion and authenticity.”

That compassion and authenticity obviously feeds into her work, and is obvious as she talks

that it means a great deal to her, partly influenced by the leaders she admired. She cites Barak Obama who “approached leadership quite differently” and Martin Luther King Jr, even Van Gough, “who had so much pain and anguish but turned it into something beautiful”.

“I like people who can find beauty and optimism and hope in what they’re doing and transform it into something amazing,” she says, concluding with a reminder of the underdogs of the world, which is where most of her true heroes lie. ■

REPORT

Top dogs

Charity Times research reveals
the stark reality of CEO diversity
at the UK's top charities



Top dogs: CEO diversity in focus

Charity Times research reveals the stark reality of CEO diversity at the UK's top charities

Diversity has been one of the biggest conversations among the charity sector in recent years, as charities attempt to lead truly inclusive workplaces. Many charities have published public Equity, Diversity and Inclusion (EDI) strategies and have claimed to be at the forefront of this change. But is this really the case?

To find out, *Charity Times* wanted to gain a greater understanding of

what diversity looks like at charity leadership level. We asked the 50 most popular charities (according to YouGov), for the names of their CEO's from 1970 until the present day. Utilising websites, newspaper and magazine archives and social media, we found information on race, gender, age, birthplace, education, and time in post for almost all of the CEOs at these charities.

The charities we looked at are the

biggest charity household names and their CEOs are arguably the most public facing. We wanted to know what type of leaders the public associate with charities; who do service-users see is 'in charge'?

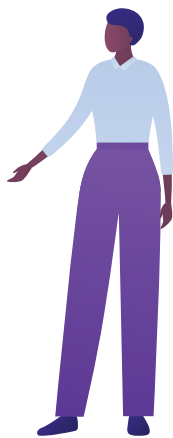
Some information was unavailable in the public domain, so included is only what we have found within the confines of the research. No assumptions or guesses were made in writing this report.

RACE

98% (323)
White



2% (8)
People of colour



Out of 333 CEOs, eight were people of colour (POC). No charity had ever had more than one POC in a CEO role and in all cases this person had a university degree, which wasn't always the case for white CEOs.

CEO NAMES



The research also found that over 52 years, there were more CEOs named David, Mike or Michael or Jonathan or John, at 16, 15 and 13 respectively, than people of colour at the UK's most popular charities.

GENDER

28% (93)
Female



72% (241)
Male

There was a significant gender split overall, with nearly three-quarters male. However, that has changed over time, with 96% male in 1970, compared to 48% in 2022. 2021 was the first year female CEOs outnumbered male.



Out of the eight CEOs who were not white, only one was a female. She was also the first POC appointed to the CEO role, taking charge from 1994 for 25 years and tied second for the longest serving CEO on our list.

EDUCATION



..... **25% (83) Privately educated**

.... **9% (29) Went to grammar school**

..... **63% (213) Went on to higher education**

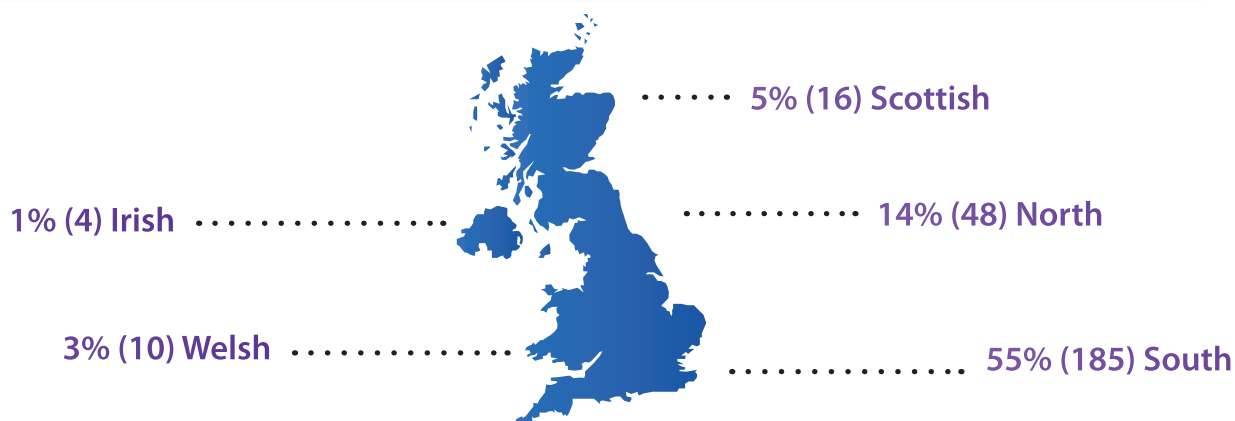
..... **17% (57) Attended Oxford or Cambridge**

A quarter of CEOs were privately educated, with 9% going to grammar school. These figures are higher than the UK averages at 6.5% and 5% respectively. 63% went on to higher education compared to the UK average of 45.7% and out of

those, 17% attended Oxford or Cambridge, compared to the 1% of the UK. CEOs in the 70s and 80s often didn't go on to higher education, but instead often took on the role in retirement after serving in the armed forces.

CEO diversity

GEOGRAPHY

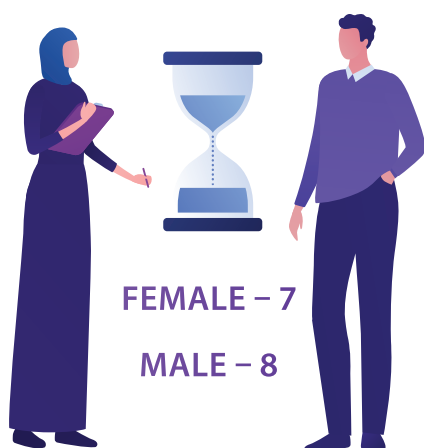


Of the information found, over half of CEOs were born, raised or lived in the south of the UK. The north represented just 14% of those found, while only 5%, 3% and 1% were Scottish, Welsh or Irish respectively, with one

CEO from the Republic of Ireland, and three from Northern Ireland. In 1970, 28% of CEOs were considered Northern; a number that has declined to 13% in 2022, with only one charity ever only hiring Northern or Scottish CEOs.

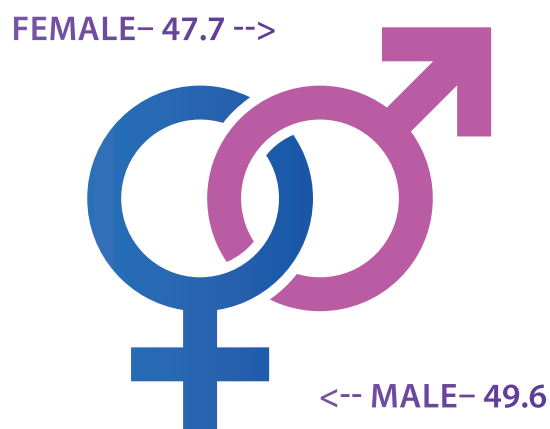
OTHER

AVERAGE YEARS IN ROLE - 7



The average years a CEO spent in their role isn't much different between genders, but it has been steadily declining over time from an average of 14.2 years as CEO in 1970 to 4.44 years in 2022.

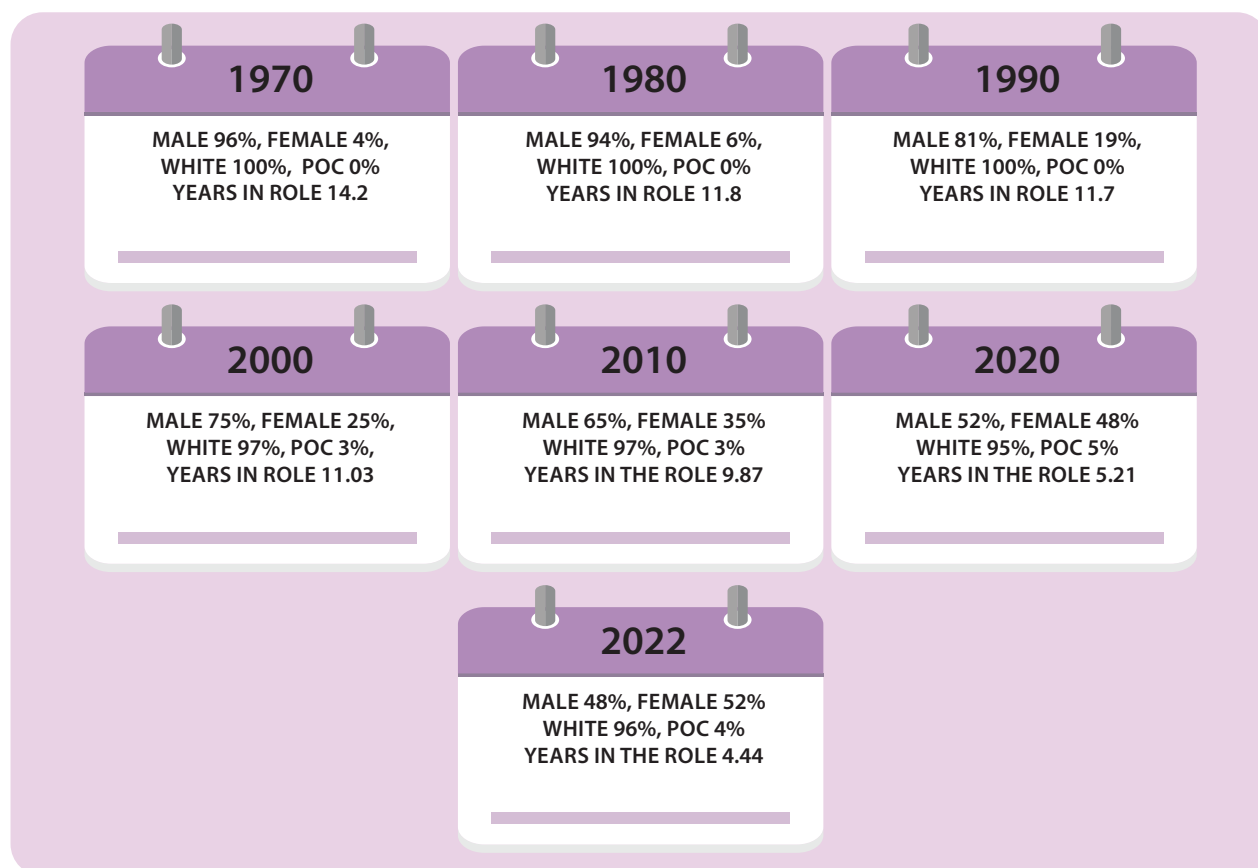
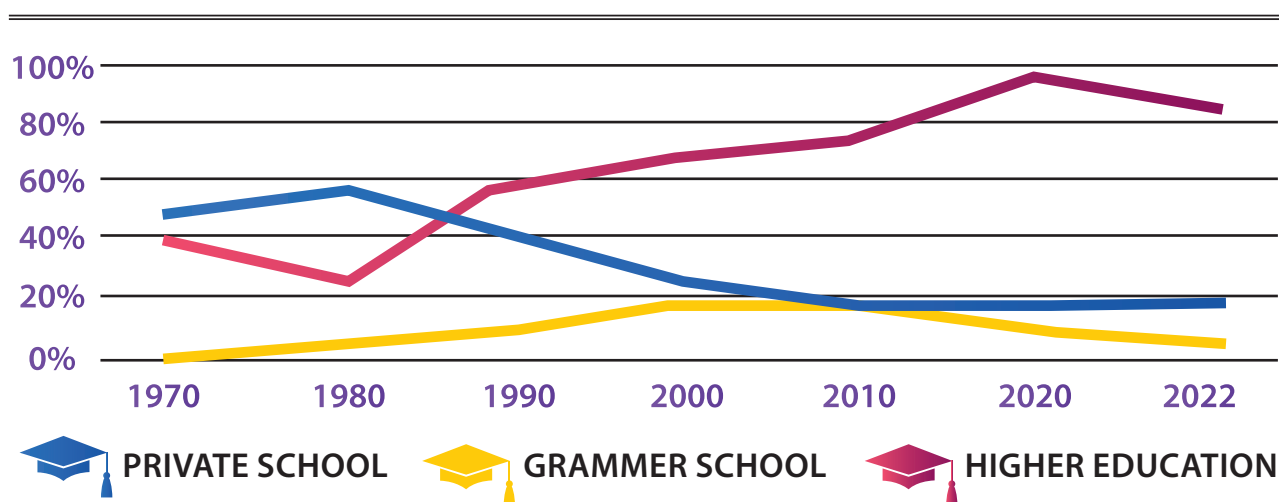
AVERAGE AGE - 49



On average, women are more likely to become CEO at 47.7 years-old, while men average at 49.6 years-old, which has broadly stayed the same since 1970. The youngest CEO was only 29 while the oldest was 68 years-old.

CEO diversity

BY DECADE



Comparing the data over decades shows some interesting trends, with more CEOs moving on to higher education as it becomes more accessible, and a dip in grammar and private school attendance over the 2000s and onwards. It also shows

that 2020 was both the highest decade for POC in CEO roles, and a near 50/50 split for male and female CEOs. Will the trends continue? We can only wait and see.

For more content on this subject, visit www.charitytimes.com

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ANALYSIS

The wage gap: How can charities keep up?

Research has shown the wage gap between charities and businesses is increasing, but how can charities keep up? **WRITTEN BY LAUREN WEYMOUTH**

The wage gap between charities and businesses has always existed, but in recent years, the once marginal gap has widened to unsustainable levels for charities – heightening fears that the sector could lose staff to better paid private sector roles unless wages increase.

In May, figures revealed by think tank Pro Bono Economics revealed annual wage growth was up 5.6% for businesses, but only increased by 3.8% for charities. It's hardly surprising, either. Just as charities began to recover from the dire economic impact of the pandemic, the cost-of-living crisis started to unfold, once again pushing demand up and bringing income down.

But how are charities expected to keep up with high wages, when there's barely enough money to fund their missions?

Max Williams, research and policy analyst at Pro Bono Economics, isn't optimistic. He suggests the combination of low pay in the sector "and high levels of concern over workforce burnout" means charities "may not be able to sustain this growing wage gap with the private sector for long". In other words, if your charity is currently struggling to recruit – it's only going to get harder.

"Given what we can expect to happen to charity demand over the coming months, the already-strained

position of many charities and the staff who work in them coming out of the pandemic, and the sizeable real-terms pay cuts facing so many who work in the sector, it's clear that sector remains in a very precarious position," Williams adds.

So where is the silver lining, you ask? The lining does exist, and it sits somewhere between low pay and workplace happiness. Pro Bono's research suggested there is a 'notable' difference in motivation among private and charity sector staff.

"Non-profit employees are more highly motivated by a sense of satisfaction in their work and a sense of purpose, while private sector employees are more highly motivated by pay and praise," he said. "This may allow greater scope for non-profit organisations to 'share the burden' of rising costs with their employees."

Employee benefits will also play a

role in securing a balance and enticing staff. While charities may not be able to offer traditional 'benefits', such as private healthcare, rail passes and pricey gym memberships, what they can offer is flexibility, opportunity and satisfaction. According to Talent Locker, flexible working, flexible annual leave and training and development are among the most desirable employee benefits.

This isn't to say offering a nice place to work justifies low pay – charities should always look to pay their staff the market value for roles and increase wages in line with inflation. This will always be the best way to attract and retain the best talent. But when the widening gap becomes unattainable, charities will need to look to their toolboxes to find alternative solutions for dragging recruits away from the goldmines offered by the corporate world. ■



Stars of TikTok: Charities taking the platform by storm

Charities are increasingly turning to TikTok to engage with new audiences and raise extra funds. But which charities are leading the way?

WRITTEN BY JOE LEPPER AND LAUREN WEYMOUTH

TikTok was once best known for short videos showing people miming to their favourite song, but the platform now has a far wider range of content. This has seen TikTok's popularity grow markedly in recent years, especially among young people.

At its current rate of growth, TikTok is expected to attract 16.8 million UK users by 2024, an increase of seven million on 2020's figures. According to Ofcom, TikTok is now used by 7% of adults for news, a significant increase of the 1% in 2020, and underlying the breadth of content on the platform. Half of its news followers are aged between 16 and 24, adds the media regulator.

The platform's broader appeal also provides opportunities for charities to use TikTok to attract new supporters, especially among young people. Charities can also turn support and interest in their mission into funding through adding TikTok donation badges to allow in-app fundraising. Sometimes the platform itself will pledge funding to good causes.

RNLI

Engaging content is vital to charities' success on TikTok, something that RNLI has excelled at since launching in July. To underline the

power of the medium for charities, the RNLI became the second biggest charity on TikTok, attracting more than 102,000 followers and over 321,000 likes within days of its launch.

This has been achieved through producing highly visual, exciting content, showing RNLI lifeboat crews and lifeguards carrying out their day-to-day work protecting people at sea.

As a result, the RNLI has become a sensation on the medium, showing viewers the impact of its work and the commitment of volunteers. It's first post on July 13 showing its crews battling rough seas is a great example of this engaging content. The video alone has attracted more than 2.6 million views.

Other posts include the rescue of a young woman by lifeboat crews at Weston-Super-Mare; videos of the different type of lifeboats used; and a behind the scenes look at a floating boathouse in Poole.

"Our TikTok launch was meant to be a low-profile affair to allow us the opportunity to test and learn so its immediate popularity took us all a little by surprise," says RNLI strategic social media manager Athar Abidi.

"TikTok gives us the chance to reach and resonate with a new audience, so over the coming weeks

we will be posting content that reflects the diversity of our work, our volunteers and our supporters to inform our ongoing content strategy."

RNLI content offering advice on staying safe ahead of the school summer holidays is among its most recent content and has been viewed 12,000 times. Abidi adds: "This new channel will help us save lives at sea by reaching a new generation of supporters by delivering key safety advice to an organic audience that now tops the one million mark who can help spread our message even further through their extended networks."

British Red Cross

While RNLI is the second biggest charity on TikTok, the first is the British Red Cross. Its channel has 436.3k followers and has garnered 7.3 million likes, since launching on the platform last year.

The charity's videos offer a raft of engaging content around health and international aid issues, giving advice on coping with extreme heat as well as information around Covid, vaccines and the plight of refugees. Among the most popular of this wide variety of content has been a video around refugee inventors. Another reveals facts around Covid.

It is also using its channel to teach



Editorial credit: FellowNeko / Shutterstock.com

people first aid skills, which is proving to be another interesting source of content. During the first Covid-19 pandemic lockdowns in 2020, the charities' content showing handwashing dance routines perfectly blended the medium's sense of fun with important messaging from the charity.

Blue Cross

Animal welfare charity Blue Cross is among not for profits to link up with TikTok for an engaging campaign that focuses on viewers' love of their pets. Using the #PetBFF hashtag, the platform encourages users to share their videos of their best friends – their pets. The platform donates money to animal charities for every video shared.

During Blue Cross's involvement, £1 was donated for every video made by users. So far the #PetBFF has received four billion views and in 2022 is currently raising money for pets in the US through the charity ASPCA.

Movember

Charities are advised to look at their mission and the work they do and see how it can engage audiences in a highly visual way. Men's health

charity Movember does this well through encouraging TikTok users to post videos of their attempts to grow a moustache to raise money for the charity.

The charity has also produced videos starring celebrities, including Stephen Merchant and Tan France, to further engage users on the platform and spread messages about men's health. The charity's videos, and those from users using the #Movember hashtag, have attracted 1.5 billion views as of summer 2022, showing the wide appeal of its content.

As well as encouraging support and donations among viewers, TikTok itself has got involved, by donating £10,000 to the charity in 2019 due to the "inspiring video content" the charity has attracted.

RSPB

The TikTok account home to the Royal Society for the Protection of Birds is also as informative as it is entertaining. The charity has amassed 26.1k followers since its inception in November 2021.

The charity's account launched during COP26, with a video of Sir David Attenborough speaking about the climate crisis at the annual

conference. Since then, the RSPB has used the platform to educate viewers on the wide-variety of birds that can be found in the UK and to entertain through Attenborough-style video footage of birds in their natural habitat.

Citizens Advice

TikTok is arguably Citizen's Advice's best performing social media platform, with just shy of 100,000 followers. The charity uses the platform for engagement, not just with donors and service users, but with employees too. People from across the charity chip in to produce content for the account, making it an interactive and diverse platform for viewers.

The bulk of content consists of informative videos that simplify complex topics for people aged 16-25. Examples include a video breakdown of news around Universal Credit, council tax payments for non-students and information on rights relating to cancelled flights.

Young Scot

The content on Young Scot's TikTok account is made entirely by young people, helping to appear genuine and relatable to its audience. The charity, which aims to inform young people aged 11-26 in Scotland, uses TikTok to further enhance its mission.

One of its most popular videos promotes the use of free bus travel for people aged under 22 in Scotland, which has been seen by over 100,000 people. Other popular videos include one that demonstrates the advantages of the Young Scot National Entitlement Card, which provides discounts at restaurants and attractions for young people. ■

FEATURE

Breaking barriers

How accessible is it to work as a disabled person within the charity sector?

WRITTEN BY MELISSA MOODY

The charity sector claims to be at the forefront of inclusion and diversity, but how accessible is it really for those with disabilities?

Recent Department of Digital, Culture, Media and Sport (DCMS) figures showed that in 2021, female and disabled charity workers earn “significantly less” than their counterparts. For every £1 earned by a male worker, disabled charity staff earn 87p. Women earn 86p.

The same figures also showed that

a fifth of charity sector roles are held by someone with a disability. But if you are one of that 20.6%, what is it really like?

For the people we spoke to, it was mixed. Often, the charities whose services support those with disabilities are better at employing staff with disabilities, with processes in place to make the recruitment process more accessible and work spaces adapted for those who needed it. For other charities, it can almost be like a lottery.

“Negative attitudes about disabled people are prevalent across all sectors,” says Fazilet Hadi, head of policy at Disability Rights UK.

“Incorrect assumptions, low expectations and prejudice are all too common.”

Disabled people in the sector know that all too well. Roughly five years ago, freelance comms professional, Francesca Baker was offered a communications position at a charity. When waiting for the contract to come through, she notified the organisation that she would need a couple of hours off a week for therapy, which she would then later make up. Four hours later, the offer was revoked because the charity was restructuring.

Baker says that at the time, she didn’t say anything. “Now I would be braver and speak out. I was quite surprised and it was a shame because it was something in my corporate jobs before that was quite easy.”

Covid-19 has now necessitated a need for greater flexibility, and Baker recognises that some things have changed since the pandemic, but feels that charities should be held to account. Hadi adds: “For office-based staff, the pandemic has opened up opportunities for flexible and remote working. Some disabled people have found this shift very positive as it enables them to better balance work with fluctuating health conditions or energy limitations. It also cuts out or reduces some very



difficult and stressful commutes to work.”

Similarly, Sophia Kleanthous, a campaigner for disabled rights has previously worked in the sector and recently began the twitter account @CharitySoAble, which aims to encourage individuals from across the sector to share their experiences.

Around seven years ago, Kleanthous started working in campaign and policy roles, and when applying for these, she was often asked to declare any disabilities. “I started noticing that when I declared my disability I wouldn’t get interviews, and when I didn’t declare my disability I would get an interview,” she explains.

She also found that recruiters were reluctant to pass details on as soon as she mentioned accessibility needs or part time.

A 2022 survey by recruitment consultancy Prospectus found that 38% of its respondents said they were disabled, with 30% revealing they have not declared it to their employer. Nearly a quarter said they were not aware of any disabled people in their organisations.

A positive example

But it’s not all bad – there are charities who do provide an accessible workplace for their employees.

Zara Borji Pour is employed by FoodCycle as a project support officer, moving up from a volunteer to her current role. She has spina bifida, which affects her mobility and requires her to use a wheelchair.

“This is my first job in the charity sector and I feel [FoodCycle] has been very understanding and accommodating towards my needs,” she says.

She believes overall there could be more representation within the



sector, but FoodCycle has made an effort to be more inclusive. “There has been a great deal of effort made to recruit volunteers with disabilities and it’s been great to see the influx of volunteers with disabilities.”

Meanwhile, Mencap are one of the charities setting an example for others in the sector, employing over 200 people with a learning disability. Ismail Kaji is the charity’s parliamentary affairs support officer and the co-clerk to the All Party Parliamentary Group on Learning Disabilities. He also has a learning disability, whereby communication can be difficult, particularly if complicated phrases and jargon are included.

In his role, Mencap provides the

support he needs to do his job effectively, such as reviewing his tasks, reading text aloud and help in meetings where needed. Like Borji Pour, Kaji hasn’t worked for another charity, but has worked within different roles in the organisation and praises the charity’s commitment to people with accessibility needs.

A changing environment

So what can other charities do to encourage more inclusive recruitment processes, and make workplaces more accessible for disabled staff?

Recently, Guide Dogs pledged to tackle ‘disabling’ work environments for its vision impaired staff. It admitted that its “built and digital

Accessibility



environments, processes and culture has and can be disabling” for some of its vision impaired team.

Its diversity, equity and inclusion strategy for 2022 said: “Guide Dogs recognises the value of staff who are vision-impaired in shaping the organisation. Crucially, we recognise that their experience of working here hasn’t always been positive”.

A compulsory training scheme for staff on vision impairment is to be introduced, with bi-annual refresher sessions. “We will equip them by raising awareness to ensure they always consider the intent and impact of their actions,” added the charity.

Guide Dogs has also pledged to improve diversity by reviewing and refreshing unconscious bias training as well as working to “celebrate the range of lived experiences” of its colleagues and volunteers. This

includes “ensuring under-represented and often excluded voices are amplified”.

But an accessible workplace starts right at the recruitment stage.

Kleanthous has had to ask for extra time on application tests and believes things like this should be offered immediately; whether that’s asking for the application form in a different scale or having the questions for the interview beforehand.

“They may seem like an advantage but actually they’re putting the disabled person on the same level as someone who isn’t disabled,” she says. “I think a lot of people are scared around offering accessibility, but it works for everyone and it can improve work and your change of success at work.”

Giving the accessibility support at the recruitment stage, Kleanthous

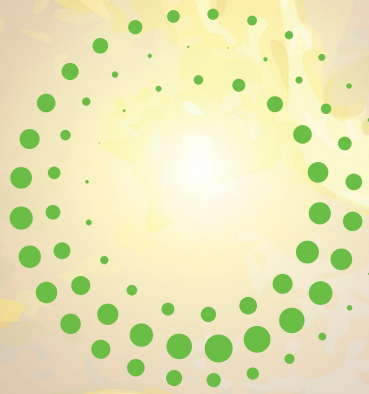
argues, also shows that the organisation is willing to show disabled applicants that they’re not going to be discriminated against. Having a disability group and disability advocates can go a long way to doing that, she adds.

The recruitment process and the way that’s framed is also essential. At Mencap, Kaji was able to demonstrate his skills in an interview instead of just talking about them, and a panel assesses the candidate, asking what they know about learning disabilities and other such questions.

“Recruitment processes can be very formulaic, often including a wordy advert, long personal statements and an interview with set questions,” says Hadi. “This often benefits people who are comfortable and used to this system. Job adverts should be clearly written and more widely circulated amongst under-represented groups. Assessments should be more flexible and designed to enable the candidate to share their skills and abilities.”

Borji Pour agrees that job descriptions should make it clear that anyone is welcome to apply to the role. “Let them express their abilities and limitations and don’t allow any misconceptions cloud your judgement on whether a candidate is right for the role.”

Hadi concludes: “Asking whether people have specific needs or require support should be part of a regular review and appraisal meetings. Many people with impairments or long-term health conditions may not identify as disabled, and discussing whether adjustments are needed would send a strong signal that the organisation wants to support, not exclude, disabled people. ■



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The Conservative leadership race: What does it mean for charities?

Rishi Sunak and Liz Truss have become the last two candidates in the running for the title of Prime Minister, but what does their election mean for charities? WRITTEN BY MELISSA MOODY

Rishi Sunak and Liz Truss have become the last two candidates in the running for the title of Prime Minister, but what does their election mean for charities?

Since Boris Johnson's resignation in early July, Conservative MPs have been battling it out to become the next party leader, with former chancellor Rishi Sunak, and foreign secretary Liz Truss landing themselves in the top two.

During their campaign to become party leader, neither candidate mentioned the charity sector specifically, but we've taken a look into their voting record as a possible indication of how future policies and candidates' opinions may affect the sector.

Rishi Sunak

According to his online voting record, Sunak has consistently voted for a reduction in spending on welfare benefits, and with the cost of living crisis, a reduction in benefits could put more pressure on charities helping those on low-incomes.

However, he has voted for raising the threshold at which people start to pay income tax and raised this in his role as chancellor, in addition to funding to help vulnerable people

cope with the cost of living crisis, which was welcomed by some charities. Sunak also announced the coronavirus furlough scheme, which arguably saved jobs during the pandemic.

But, last year he was criticised for cutting a £20-a-week increase to Universal Credit that had helped some of the poorest families through the pandemic.

In terms of social issues, Sunak has abstained from votes on equal marriage and equal gay rights, and voted against laws to promote equality and human rights in addition to voting for a stricter asylum system, supporting Priti Patel's Rwanda deportation plan.

For environmental issues, a growing part of the sector, Sunak has 'almost always' voted against measures to prevent climate change, and on Monday a high court judge ruled that the government's net zero strategy was 'inadequate', giving ministers until March 2023 to make changes – another challenge for Sunak if he gets into office.

On his voting record, in February 2020, Sunak voted not to call on the government to make a plan to eliminate the majority of transport emissions by 2030.

He also voted not to reduce the permitted carbon dioxide emission rate of new homes and voted against setting a decarbonisation target in the UK, further voting to apply the 'climate change levy' to electricity generated from renewable sources.

Liz Truss

According to Truss' voting record, the Foreign Secretary has consistently voted against raising benefits in line with inflation, and a reduction in spending on benefits.

She is considered the more right-wing candidate, but has generally voted in line with Sunak and also voted for a stricter asylum system and a stronger enforcement of immigration rules.

However, Truss has voted for equal gay rights and gay marriage, with a mixture of for and against votes for laws to promote equality and human rights.

In terms of the environment, Truss has recruited from and met with secretly funded climate sceptic think tanks in the UK and US. In 2012, she also voiced support for not just a controversial third runway at London's Heathrow Airport but a fourth – going further than the airport itself.

Leadership race



As environment minister in 2014, Truss cut subsidies for solar farms calling them a “blight on the landscape”. As solar costs fell, the UK’s solar capacity continued to rise regardless and Truss recently told a Conservative Environment Network (CEN) hustling that Russia’s war in Ukraine had strengthened the energy security case for clean energy.

A general election?

As with past leadership contests, there is a chance a general election could be called after the leadership contest, with precedent from both Teresa May and Boris Johnson. If a general election is called, it will have its own set of issues for charities.

In the short term, in the run-up to an election, there are legal and regulatory issues that charities need to bear in mind. In previous elections, charities have inadvertently been caught up in political campaigns in a way that damages their reputation and could

result in them falling foul of the Charity Commission’s guidelines about political activities.

Guidance suggests charities should remember they are established for charitable purposes only, and that a purpose that is political cannot be charitable. That is not to say that charities cannot speak out and campaign on issues that are also being debated in the political arena, but any charity involving itself with political campaigning or political activity should only do so if this is a means of furthering its charitable purposes.

Charities also need to ensure their campaigning and advocacy work does not have a party-political component. This means they can neither support nor oppose a political party, but they can support or oppose a policy that is relevant to their charitable aims.

Charities must also not donate funds to political parties and cannot assist candidates with their election campaigns – financially or

otherwise. However, there are many other things they can do, while maintaining political neutral.

On top of heeding the regulator’s guidance, charity trustees who engage in campaigning in the run up to an election may need to be aware of the requirements of the Lobbying Act. There may be circumstances where spending money on activities would require the charity to be registered with the Electoral Commission as a non-party campaigner, so this could be worth checking.

The new Prime Minister will be announced on Monday 5 September 2022, although they will not officially be appointed until the next day, after Boris Johnson has informed the Queen that he is resigning. Johnson will remain in his leadership position until the new leader is chosen, although he has promised not to make any significant decisions or ‘major changes of direction’ while he is still in office. ■

“Unnecessary criminal record checks are a barrier to inclusive recruitment”

Charities are missing out on a wide range of recruits due to ‘often unlawful’ criminal record checks, Angela Cairns argues. **WRITTEN BY ANGELA CAIRNS**

I’ve become obsessed with looking at job adverts. Not because I’m unhappy in my role – far from it, I love my job – but because I’ve become aware of a trend for employers to ask for unnecessary and often unlawful criminal record checks for applicants.

I’m the CEO at Unlock, a national charity supporting and advocating for people with criminal records to be able to move on positively with their lives. It’s perhaps not a surprise that criminal record checks, or Disclosure and Barring Service (DBS) checks, are something we hear a lot about, from people calling our helpline or accessing our online advice services. Nearly 12m people in the UK have a criminal record, so this is far from a problem affecting a tiny proportion of the population.

This overuse of criminal record checks is frequently seen in charities in England and Wales for a couple of reasons. Firstly, because the rules and requirements for disclosure of criminal records are complex and confusing. It’s easy for employers to unwittingly pick the wrong level of check to do. Secondly, because getting a DBS check has become closely associated with safeguarding.

Safeguarding is never just a

background check, rather a series of ongoing measures we can use to keep people safe as we go about our business. Relying on enhanced criminal records checks can lead organisations to think they’ve ‘done’ safeguarding. But anyone can abuse their position, anyone can commit a crime, whether or not they have a past conviction.

I get it, because until I began working for criminal justice charities, I too subscribed to the belief that safeguarding required the highest-level of checks for anyone working or volunteering for a charity. But let’s look at an example:

Shelly, who had one past conviction resulting from an altercation with a neighbour, applied for a job working for a large charitable organisation at their rare breeds centre. The job involved feeding and cleaning goats, sheep, pigs and chickens. The organisation applied for an enhanced DBS check stating that Shelly would be employed as a ‘care worker’. When she raised her concerns about the level of check being carried out, Shelly was told “our safeguarding team at our HQ in London will not allow us to have staff on site without an enhanced DBS in place”. Clearly

blanket policies like this are disproportionate and can result in qualified individuals being written off because of one mistake in their past – unrelated to the job they are applying for.

There is also an equality and diversity element to all this. Our criminal justice system disproportionately impacts people from racialised communities, as a result they are also more likely to face discrimination because of a criminal record.

As charities, we can’t afford to ignore the diverse talent pool of the 12m people with a criminal record. I urge people to consider the value of a person’s skills, education, abilities and experiences – in short, their suitability for the role – before asking about their past.

And I ask you as charity leaders, recruiters and colleagues to

- Include people with criminal records as part of diversity and inclusion initiatives
- Consider whether you need that criminal record check for the role you’re about to advertise
- See the person first – they may well be your next superstar fundraiser, support worker or CEO.■

Angela Cairns is CEO of Unlock

ADVERTORIAL

How is the cost of living impacting fundraising?

The rising cost of living is already taking a heavy toll on the public, with 58% of people saying they are worse off financially than six months ago. Price rises for groceries, fuel and energy are bleeding into the charity sector and creating a 'cost of giving' crisis, with 55% of the public stating that their financial situation makes it harder to donate.

New research from Enthuse shows that the rising cost of living is now the predominant worry for the public, with three quarters (76%) of people naming it as their main concern. This is up from 45% just three months ago. When asked to identify the reasons for feeling worse off financially, the public said that energy prices (77%), food prices (71%), and the cost of running a car (43%) were having the greatest impact.

The data shows that those who feel worse off are already being more judicious about how much they give to charity and to whom. Just under one in five (17%) have stopped making donations, a further 61% are being more selective or giving smaller and fewer donations to charity – meaning a total of 78% of those who are struggling have reigned in their giving.

Donations hold up

The good news for charities is that, despite the economic pressures, 74% of the public have donated in the past three months. The healthy

The latest Donor Pulse Report, published by Enthuse, highlights the impact of the current crisis on charity fundraising

WRITTEN BY BILL MCINTYRE HEAD OF PR AND CONTENT, ENTHUSE



level of donations includes support for the humanitarian crisis in Ukraine, with one in five people (19%) saying they have donated to causes supporting this area in the last three months.

Encouragingly, the public's intention to donate in the coming months remains high with 73% saying they will do so. Additionally, online donations are at their highest level since this research began in 2020 – 45% of people giving this way in the last quarter. The data also suggests charities would do well to take donations through their own site, as this leads to a 18% higher donation amount than through a consumer giving platform (£38.39 vs £32.03).

Fundraising fit

One of the aftereffects of the pandemic is that while some people got more active, many were less so.

Nearly half of people (47%) say they see their fitness as an obstacle to taking part in physical fundraising events. It's worth noting that the type of physical fundraising event that interests the most people is walking (50%) - ahead of running in second place at 19%, followed by cycling (16%) and swimming (14%).

The cost of living is not just an issue when it comes to donations but for fundraising as well. The price of registering for an event is not seen as a major deterrent by people when it comes to deciding whether or not to take part (just 14% feel this way) but asking for sponsorship is a different story. One in three people (33%) say they are worried about asking for sponsorship from friends or family in the current economic climate, as they know money is tight. ■

You can download the full report at: www.enthuse.com/insights/donor-pulse-report-summer-2022.



CEO DIARY: BEJAL SHAH

“I’m an introvert – quite a rare thing for a chief executive”



BEJAL SHAH, CEO OF REACHOUT, TAKES US THROUGH THE FINAL WEEK OF THE CHARITY’S 2021/22 MENTORING PROJECTS AND THE IMPORTANCE OF COLLABORATION, SUPPORTING EACH OTHER AND SHARING IDEAS.

ReachOut is a national mentoring and education charity rooted in local communities. Working with schools in under-resourced areas, they run 1:1 mentoring programmes, supporting young people to grow in character and confidence, sparking change in themselves and society.

improve awareness of our organisation and understanding of our work. It’s important to me that staff at every level contribute ideas and provide challenge and feedback – something I want us to maintain as we grow. At every meeting we also announce that month’s ‘Character Legend’ – a member of staff nominated for upholding ReachOut’s values – the character strengths of fairness, good judgement, self-control and staying power. We aim to develop these in the young people we work with and expect our team to demonstrate and develop them too.

Monday

At ReachOut, we run our mentoring programmes over the course of the school year, and Monday begins our last week of delivery for 2021/22. It’s been a remarkable year – after weathering the Covid storms, we’ve reached more young people and raised more money than any-time in ReachOut’s history. I couldn’t be prouder of the team and not a bad achievement for my first full year as CEO! At midday, our 28 staff members gather on Teams for our monthly all-staff catch-up. Recently, we start every meeting with five-minutes in small groups focused on how we’re maintaining our wellbeing. We talk about what we’re looking forward to outside of work and share ideas for making the most of the long days. In today’s meeting, we’re sharing research we’ve done on ReachOut’s external communications and discussing how we can use the findings to

Tuesday

Today is a ‘business development’ day. I try as far as possible to theme my days of the week so that I’m keeping an equal focus on all the key parts of my role. In a session with the fundraising team this morning, we talk about our work to develop a network of major donors, a strategy that should eventually provide certainty over at least a proportion of our income, allow us to plan more easily for the long-term and reach even more young people in the future. Afterwards, I start contacting some of the people on my list to engage with ReachOut. Nothing gets across the incredible impact of our work better than experiencing it first-hand so an invite to one of our mentoring sessions is always included in this communication. I’m an introvert – quite a rare thing for a charity chief executive I think. Whilst I enjoy being out and about, it can be draining. What really gives me energy and drives me forward is seeing and hearing about our impact. When things get challenging (which

of course they often do in this job), I can guarantee that a visit to speak to our mentees and mentors puts everything into perspective and reminds me why I love what I do. That evening I visit a project at a school where a group of young girls have been on our programme for five years, many with the same mentors throughout. I've seen them develop in character and confidence since they were just 11 years-old. They're a prime example of why mentoring works best as a long-term, intensive provision. Their openness and self-awareness astound me.

Wednesday

On Wednesday, I meet with one of the co-founders of Forward Culture, a CIC focusing on the empowerment of South Asian Women. They run The Browngirl Mentoring Programme – matching young South Asian girls with female adults from the same background to provide culturally-specific mentoring. I wish I had this resource when I was younger, so this is very close to my heart! I voluntarily advise them on the design and delivery of their programme and processes; I love that I can help in this way. I'm also really interested in how they've engaged so many mentors from a specific background. One of our key aims at ReachOut is for our volunteer mentor pool to be more representative of our young people so I'm keen to take on any learnings. Forward Culture have a very clear message in their digital recruitment campaigns for who they're looking for and why. We can absolutely do the same.

Thursday

Being relatively new in this role, I've been trying to speak to lots of fellow-CEOs who have been doing the job for longer. Today, I have a meeting with the CEO of an organisation with a similar mission to ours to discuss impact measurement. It seems all of us in the youth development/education space face similar challenges and questions. What and how much data do we collect? What information is the

most useful for us and for our stakeholders? They give me some great ideas and points to consider for reviewing our methodology, but most of all, some reassurance to remember that we are doing the best we can with the resources we have. Later, I meet with the deputy head of one of our longest standing school partners to discuss the same topic. They provide feedback on how we can work with schools to continue meeting the changing needs of young people and how we can better collate evidence of successfully achieving this.

Friday

Once a month I meet with my own mentor. They listen and ask very incisive questions which help me to reflect and prompt me to come up with solutions to any issues I'm facing. Where I'm stuck for ideas, they provide practical tips and even relevant reading material. We've only recently started working together but I'm already getting such benefit from our interactions. I've carved out time immediately after this to ponder on what we covered and set out actions that I've taken away from our conversations. I try to keep Friday free of internal meetings to have that 'thinking time' and for dealing with anything that I haven't got around to through the week. Next week is a big one with end of year celebration events happening in Manchester and London, as well as a board sub-committee meeting. I finish off the day planning and noting down some bullet points for opening and closing the events. It's so special to be able to host these again after two years online and (despite being an introvert) being around all those involved with ReachOut truly invigorates me so I'm looking forward to this time.

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 Charity Times' senior writer at:
melissa.moody@charitytimes.com

In focus: The Charity Shop Gift Card

Lee Fellows, managing director of The Charity Shop Gift Card explains what it is, how it works and how charities can benefit. **QUESTIONS BY MELISSA MOODY**

What is the charity shop gift card and how does it work?

At its most basic, The Charity Shop Gift Card is a 'multi retail' gift card that can be spent at participating charity shops. It is bringing together retail charities to gain meaningful access to the £7 billion UK gift card market. We're marketing the cards to consumers looking to shop more sustainably and have made the card available online through our website and third-party websites, via participating charity retailers, via incentive companies that supply gift cards for consumer and employee rewards and incentives, and via the gift card malls – the large racks of gift cards in supermarkets and other large retailers. We're also working directly with councils, charities and other support agencies that provide financial support to those in hardship as the gift card offers a more sustainable way to disburse funds, aiding the circular economy, reducing landfill and generating revenue for the participating retail charities.

How did you come up with the idea?

I can't take any credit for the idea as this came independently to two different people; Sarah Cox who is

our head of support has a background of teaching in an inner-city area of Bristol and had seen first-hand some of the challenges families can have in ensuring that their children had appropriate clothing. She has always been a keen charity shopper but this passion took on a new light when circumstances meant that donated items became a necessity rather than choice. After rebuilding the life of her and her children, Cox wanted to find a solution that would enable people experiencing financial hardship to shop 'for free' in charity shops so that they could choose the items they need with dignity and autonomy. She strongly believed that a charity gift card that could be made available to councils offering welfare assistance, food banks and other support organisations was the answer.

Lottie Bradley also had a hand. She has worked in charity retail for over five years and is currently the retail design manager for Save the Children. She saw a gap in the market for an eco-friendly gifting solution that could unite charity shops on the high-street and champion circular fashion. Following an introduction by Robin Osterley, CEO of our partner, The Charity Retail Association, the two complementary ideas helped shape

what has become The Charity Shop Gift Card. What I've been able to do is to use my industry experience working for a large global gift card issuer to help make the idea a reality.

What are the benefits for charities?

Ultimately this is about generating incremental revenue. Whilst some charities have already launched their own gift card schemes, The Charity Shop Gift Card is perfectly placed to capture market share from consumers who are currently buying and receiving retail gift cards for many other high street shops due to the lack of available options. Critically, our gift card provides an effective, low admin way of working with councils, charities and support agencies that provide financial support to those experiencing financial hardship. Again charities do work with councils already but The Charity Shop Gift Card will rapidly expand this opportunity that eliminates some of the known issues of lack of choice and manual administration. We also expect the gift card to introduce new people to charity shopping which will lead to a long-term relationship of support. Our gift card also provides a new way to engage both individual and corporate supporters in a new way.



For charities and social enterprises that opt to use the card as a way of disbursing funds to their service users, The Charity Shop Gift Card ensures those funds stay within the charity sector, helping not just the recipient but also the charity where the funds are spent. As charity shops typically sell essential items, utilising the gift card reduces the risk of funds being misspent and helps reduce the number of items going to landfill.

Being a social enterprise adds another layer of giving, with 65% of

our surplus going towards funding free gift cards to people who need them with these funds coming back into the participating charities as spend.

What has the response been like so far?

We've been taken aback by the positive reaction to the gift card and the goodwill. The most common reaction is "how does this not exist already" which is always a good indicator that you're on to a good thing! We're really pleased with the

uptake by charities so far and this is critical as the scheme only works if there are plenty of charity shops that are part of the scheme to make it work for consumers, councils and support agencies. We have over 600 shops accepting the card today including national chains such as Marie Curie, YMCA and The Children's Society, and expect over 2,000 shops to be involved before the peak gift card sales arrive in November and December. We're also getting positive feedback from the incentive companies that tell us that their customers are seeking more sustainable gifting options, something that charity shopping certainly is.

Is it easy for charities to set up and how do they go about it?

Our gift card is processed via compatible EPOS systems and we've had fantastic support from most of the EPOS vendors that work with charity shops, so for most charities there is very little to do to get started. It is simple to use for both cardholders and shops, so much so that we've had less than ten calls to our customer service team looking for help since we launched last year. We provide cards to our charity partners with everything that they need to get started but do ask that they help create awareness of the scheme which is key. Charities that are interested in joining the scheme and that use a compatible till system can be up and running within a few days, so it really is very simple. ■

Interested charities can contact the team via their website or by emailing info@thecharityshopgiftcard.co.uk

ADVERTORIAL

Know thyself: Understanding behavioural bias

Lurking behavioural biases are an often-overlooked source of risk. Investment success is as much about keeping a level head as it is about picking winners.

WRITTEN BY RICHARD MAITLAND, PARTNER, HEAD OF CHARITIES, SARASIN & PARTNERS

As COVID-19 hit in 2020, the S&P fell over 30% from its February high in a matter of months before bouncing back up to pre-COVID levels by August that year. By the end of 2021, mega-cap tech valuations had spiked to extraordinary levels, with the NASDAQ up 26.6% for the year, before entering a downward spiral in 2022 after Russia's invasion of Ukraine.

The explanation for such fluctuations – when the underlying story of many companies has not changed materially – lies partly in investors' own propensities for excess. Stock markets abound in behavioural traps for the unwary. A rising market probes for greed and plays on it, tempting investors towards higher-risk strategies that promise higher returns. The more the market rises, the greater the temptation is to increase levels of risk, and abandon sound investment principles. Yet, the higher the market goes, the lower the incremental return is likely to be, leading to greater chances of a setback.

A falling market probes for fear, tempting investors towards lower-risk strategies with the threat of further price falls. The lower the market goes, the greater the

temptation to reduce risk and abandon fundamental investment beliefs. Yet history shows that the lower the market falls, the greater the future returns.

The circle is complete when investors are lured into buying at the top and terrorised into selling at the bottom. The trap is absurdly clear in retrospect but it is invariably camouflaged with good reasons for believing that 'this time is different'.

When not inciting fear or greed, the market probes for vanity, inviting investors to interpret political events, anticipate economic cycles, divine the course of inflation and assess the merits of tens of thousands of companies. Even if an underlying judgement is correct, the timing may still be wrong. Having encouraged their vanity, the market is brutal in confronting investors with the fact that they are often wrong, tempting them into abandoning the principles in their investment policies.

Once detached from fundamental beliefs about the right way to approach investment, investors are likely to fall back on opportunistic trading, thereby becoming doubly exposed to the distorting influences of greed and fear.

How should investors proceed, knowing that both they and their

investment managers are prey to greed, fear and vanity? A good starting point is to have realistic expectations about what can be achieved by stock market investment. The next is to appoint an investment manager whose methodology is persuasive and whose philosophy the investor can share in good times and bad. Finally, it is important to allow the manager to apply this methodology over a period of five to seven years without seeking to influence policy, unless the investment objectives change. At the end of this period, the results should speak for themselves.

Unfortunately, no single approach to investment outperforms all the time. Investment managers want to keep their clients when performance is lacklustre, so there may be a temptation to adopt an approach that reflects market fashions. The key to resisting the market's temptations and breaking the cycle of greed and fear is the disciplined application of clear principles based on deeply-held convictions.

Provided their confidence in their manager's methodology is intact, the best contribution that investors can make during a period of underperformance is to buttress their manager's determination. If the



manager can demonstrate reasonable grounds for thinking that the process remains sound and should produce satisfactory results in due course, there need not be criticism.

There may also be times when weak performance is due to the manager falling prey to fear, greed or vanity. A manager's approach might become more aggressive during a bull market or overly cautious in a bear market. Knowledgeable investors will be watching for such signs. The best way for investors to protect

themselves against behavioural biases is to remain diligent in how they manage their relationship with their investment manager. If the relationship is a partnership, combining obligation with tolerance and goodwill, the managers should have the confidence to stick to their knitting.

There are two sorts of bear market, the most common being the short, sharp variety, while the other is the slow, lingering type. Bear markets are invariably rooted in deteriorating economic conditions,

which are magnified dramatically by investors revising down their valuations of financial assets as conditions worsen.

Bear markets begin when least expected, often after a euphoric bull market in which many new investors have come to believe that investing is much less risky than it really is. Bear markets are usually well established by the time most commentators accept that the bull market is really over. Once a bear market is an established fact, the world looks very different: investors question whether the stock market is an appropriate medium of investment at all.

This sense of shock should not be underestimated - bear markets shatter investor confidence in ways scarcely imaginable at the peak of a bull market. Arguments in favour of equity investment count for little if you have just suffered a 25% fall in the value of your equity portfolio and there is little prospect of recovery in the foreseeable future. This is instantly recognisable from the experience of recent years and there is every chance that future bear markets will be equally savage.

Despite the rapid recoveries witnessed in 2009 and 2020, investors should not expect central banks to ride to the rescue after every collapse in confidence and asset values. Far better is to ensure that an investor's mind-set and their portfolio are well-prepared ahead of time to cope with bear markets – whether short and sharp or slow and lingering – that will inevitably occur from time to time. ■

SARASIN
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INVESTMENT

Multi-Asset Funds	Investment Manager	Fund Size (£m)	Cash %	Bond %	Equities	
					UK %	Intl %
Barclays Charity Fund	Barclays	239.4	3.4	18.9	23.6	46.7
Armed Forces Charities Growth & Income Fund	BlackRock	417.7	-0.2	15.1	27.9	34.7
Catholic Charities Growth & Income Fund	BlackRock	177.5	3.0	12.7	28.7	32.9
Charities Growth & Income Fund	BlackRock	196.1	2.4	13.0	28.1	34.6
Charity Multi-Asset Fund	Cazenove	679.1	2.2	7.8	10.0	59.9
Responsible Charity Multi-Asset Fund	Cazenove	876.1	3.2	8.0	0.0	72.5
CBF Church of England Investment Fund	CCLA	2035.1	8.5	0.0	9.7	62.8
COIF Charities Ethical Investment Fund	CCLA	1948.3	9.1	0.0	9.0	64.2
COIF Charities Investment Fund	CCLA	3536.9	8.5	0.0	8.5	64.1
Amity Balanced Fund for Charities	EdenTree	24.8	1.2	18.4	53.8	26.6
Newton Growth & Income Fund for Charities	Newton	742	5.7	14.2	39.2	40.9
Newton SRI Fund for Charities	Newton	113	3.3	12.6	33.0	48.3
Newton Sustainable Growth & Income Fund	Newton	70.7	7.3	11.2	24.6	54.1
Active Income and Growth Fund for Charities	Rathbones	237	7.5	14.9	24.3	35.5
Core Investment Fund for Charities	Rathbones	142.6	2.3	7.6	36.4	37.2
Charity Assets Trust	Ruffer	190	2.8	36.6	14.4	21.7
Sarasin Climate Active Endowments Fund	Sarasin & Partners	499.4	3.0	7.1	19.3	50.8
Sarasin Endowments Fund2	Sarasin & Partners	2338.1	5.3	7.0	21.0	48.5
Sarasin Income & Reserves Fund2	Sarasin & Partners	140.4	1.5	61.4	11.2	10.7
Waverton Charity Growth & Income Fund	Waverton	51.1	2.8	9.8	13.1	55.8

Peer Group Indices ¹						
Sterling Cautious Charity Index	ARC		20.9	42.7	6.6	8.3
Sterling Balanced Asset Charity Index	ARC		8.8	27.3	21.8	23.0
Sterling Steady Growth Charity Index	ARC		5.1	19.8	34.6	29.9
Sterling Equity Risk Charity Index	ARC		0.0	13.9	47.1	33.4

Market Indices ¹						
UK Equities	iShares	2.9	16.0	2.9	15.2	24.0
International Equities	iShares	-2.4	15.5	-2.4	51.4	71.1
UK Sovereign Bonds	iShares	-7.2	-5.1	-7.2	-1.6	2.2
UK Corporate Bond	iShares	-6.7	-5.8	-6.7	3.2	8.5
UK Property	iShares	-2.7	21.1	-2.7	19.1	25.8
Cash	-	0.1	0.1	0.1	0.9	2.0

INVESTMENT

Source / Asset Risk Consultants

Property %	Other %	Last Quarter	Last 12 Months	YTD 2022	Last 3 Years	Last 5 Years	Last 10 Years
5.2	2.1	-1.6	8.7	-1.6	22.1	37.2	-
9.6	12.9	-2.4	9.0	-2.4	30.7	43.0	129.4
10.3	12.4	-2.4	9.2	-2.4	27.9	44.2	121.1
5.2	16.7	-2.2	8.0	-2.2	-	-	-
7.3	12.8	-2.1	7.8	-2.1	25.1	31.0	93.1
5.5	10.8	-3.3	9.0	-3.3	31.8	-	-
4.6	14.5	-4.9	11.5	-4.9	40.5	67.8	189.0
5.0	12.7	-4.5	11.6	-4.5	38.6	62.6	173.7
4.6	14.3	-4.7	11.7	-4.7	38.8	63.7	177.4
0.0	0.0	-2.0	2.9	-2.0	17.0	23.0	85.6
0.0	0.0	-2.1	12.7	-2.1	30.5	49.3	165.1
0.0	2.8	-3.4	7.6	-3.4	34.3	47.4	131.4
0.0	2.9	-4.4	8.3	-4.4	28.8	43.9	-
6.8	11.0	-2.6	6.3	-2.6	22.4	33.8	-
5.7	10.8	-4.9	6.0	-4.9	27.3	37.4	-
0.0	24.5	5.5	8.0	5.5	37.1	35.1	79.5
5.7	14.1	-4.4	5.1	-4.4	30.9	-	-
5.6	12.7	-4.1	4.9	-4.1	29.2	41.4	121.1
0.0	15.2	-5.2	-1.4	-5.2	9.1	13.5	55.7
6.9	11.7	-2.1	9.3	-2.1	-	-	-

4.1	17.6	-2.4	2.4	-2.4	9.7	12.3	38.3
4.7	14.4	-3.4	5.4	-3.4	17.4	23.5	73
3.6	7.1	-3.8	6.3	-3.8	21.4	30.4	95.6
2.6	3.0	-4.4	6.8	-4.4	23.1	33.1	109.9

88
243.4
30.4
55.7
123.2
4.2

Key

¹ 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.

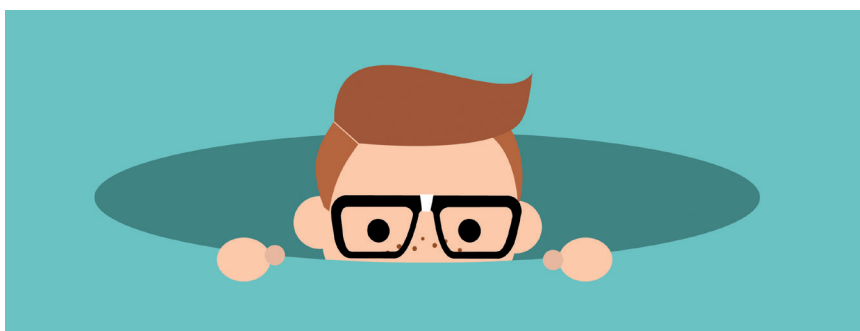
Nowhere to hide

"In volatile markets, even the best investment managers cannot avoid losses

WRITTEN BY GRAHAM HARRISON, ASSET RISK CONSULTANTS

The first six months of 2022 ("H1") have been tough for investors with sharp drops across both equity and bond markets. The last time US equities recorded a similar fall in the first six months of a year was sixty years ago at which time President Kennedy was facing escalating tensions in Cuba between the US and the Soviet Union. Things have been no better for US sovereign debt which recorded the worst first six months for a calendar year since the US Constitution was ratified in 1788, a year before the US Treasury was founded! outperformed mid-cap equities; and short dated gilts outperformed longer dated gilts over the quarter.

It has, of course, not only been US financial markets that have suffered. Losses in the H1 2022 were unusually widespread and severe with only commodities and gold providing Sterling investors with positive returns. Many asset classes experienced one of their worst half year results since December 2003. Note that, once again during market turmoil, Sterling weakened and those investors with an international bias would have benefited from a strengthening of the US Dollar



versus Sterling of 11.5%. With the commodity sector falling out of favour with those seeking to reduce the environmental impact of their portfolios; for most investors, there has been nowhere to hide.

The table below shows the performance of the ARC Charity Indices, comprised of over 5,000 portfolios in four risk categories. The table includes the ranked performance and the range of returns delivered, measured by the 25th and 75th percentile returns.

The results show that H1 2022 was the worst or second worst half year period since the inception of the indices and that many charity investors will have experienced a decline in value of 10% or more across all risk categories. Only the declines in the Global Financial

Crisis matched or exceed those of H1 22.

For investors, H1 2022 has been challenging, as they have seen portfolio values fall significantly and with the backdrop of record high inflation, the ability to generate income to match rising costs will have been impacted. The path to recovery in 2022 is less certain than the short sharp drop and rapid recovery of 2020 and trustees may need to plan for longer periods of reduced contributions from their portfolios to their expenditure needs. Monitoring portfolio performance and maintaining an on-going dialogue with their discretionary managers will be key for trustees in this time of volatile markets where even the best managers cannot avoid losses. ■

ARC Charity Indices	6 Months to June 2022			
	Cautious	Balanced Asset	Steady Growth	Equity Risk
Index Return	(7.1)	(9.5)	(10.4)	(11.8)
Rank / 37	37	36	36	36
25th Percentile	(4.2)	(7.6)	(8.6)	(9.4)
75th Percentile	(11.2)	(10.7)	(12.1)	(13.6)



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All figures as at 31 December 2020



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