

Guide:

Charity Digital Guide 2022

A look at some of the key trends and influencers in the charity sector

Profile:

Saleh Saeed

The CEO of the DEC on leading through the Ukraine crisis

Feature:

Legacies

How can small charities seek to get a piece of the legacy pie?

Opinion:

Secret CEO

An anonymous CEO opens up about loneliness at leadership level

Slow and steady

Charity mergers are at a high, but so too are the immediate financial implications. Will those that have acted now reap financial benefits further down the line?



LEADERSHIP VOICES

"Being a CEO can be lonely"

Plus:

News, reviews, columns

Sector appointments



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Ideas worth sharing

One of my favourite things about the charity sector is the level of support that organisations within it provide to each other.

Unlike some business sectors I've written about before, charities rally around each other in the same way we do our best friends. There is a bit of competition, of course, but little in comparison to the business world. If a charity wins a round of funding that another has missed out on, very little sourness remains; charity leaders celebrate each other's wins and move on.

But despite the sector being such a supportive place to work, it can often be difficult for leaders to connect with one another. That is why we launched the Charity Times Leadership Network in 2020, with the view to bring people together and to learn from one another. The next step in this process for us has been to launch LeadNet – a new online discussion board exclusively for charity leaders.

The idea behind the new tool is to allow members of the network to share ideas with fellow charity leaders (think Mumsnet and Reddit, but with a focus on charity leadership). Got something on your mind? Want to ask for some advice? Interested in what other charity leaders have been working on? Whatever it is you need support with, LeadNet is designed to help.

Some of our most popular pieces of content are opinion-based, case studies and/or interviews. We've concluded that generally, we're all pretty nosey, and it's great to know what others in the sector are up to so we can learn, grow and ultimately be more productive. So, we hope LeadNet helps with this. The Charity Times team and I will be sharing some of our favourite content on the page for you to comment on and we'll occasionally post polls for you to get involved in, but otherwise, the space is yours to use as you wish. You'll find a QR code to log in on p.21 (simply use your Leadership Network login to gain access).

In the meantime, in this issue, we're diving into the financial benefits and pitfalls of mergers (p.22) – they're on the rise, but are they really a solution to financial distress? We're also exploring digital trends in this year's Charity Digital Guide and shining a light on some of our favourite charity digital influencers.

Happy reading and happy chatting!



Lauren Weymouth, Editor

charitytimes



May 2022



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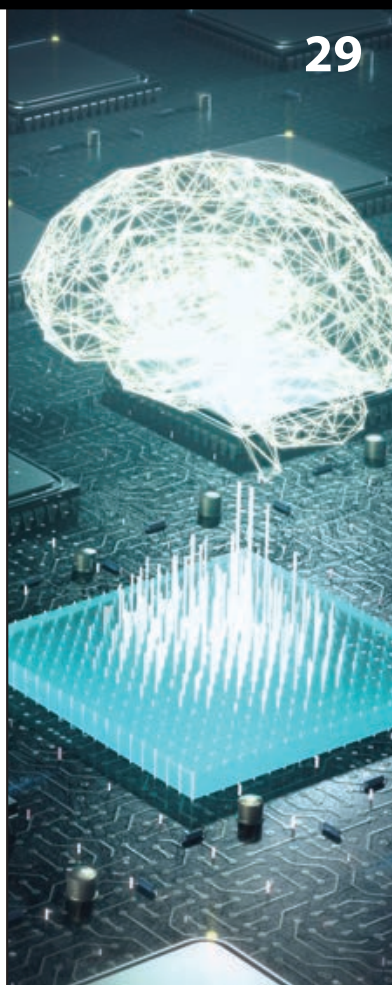


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in brief

AMNESTY UK 'EXHIBITS INSTITUTIONAL RACISM' INQUIRY FINDS

An independent inquiry into allegations of racism at Amnesty UK has found that the charity “exhibits institutional racism” and had previously failed to embed equality, inclusion and anti-racism into its organisations. According to early findings there “have been some improvements” since summer 2021 but “significant progress is required” and calls for improvements in leadership, evaluating equality and diversity data and improving the whole organisation’s “working culture”.

'RAPID RISE' IN GIVING VIA DIGITAL WALLETS

Donors are increasingly giving to good causes via one off payments through digital wallets, goDonate has found. Donations via Apple Pay increased by 60% between 2020 and 2021. Over the same period Google Pay donations rose by 45%, according to latest figures. Digital wallets now account for one in five monthly online donation payments and 43% of all one-off online donations.

TRUSTEE BANNED FOR FOUR YEARS AFTER USING CHARITY ACCOUNT TO CRITICISE GOVERNMENT

Ellie Waugh, the founder of homelessness charity Humanity Torbay, has agreed not to be involved in running any charity for the next four years following a statutory inquiry. The regulator issued advice to Waugh after being alerted to “several posts on a Facebook page issued by the charity, which criticised the current government”. Shortly after the inquiry was launched Waugh announced she was leaving the charity. Trustees then agreed to close the charity due to the adverse social media attention.

“The proportion of people who donated to NHS and public health charities has fallen from 31% to 26% over the last year.”

LESS THAN A QUARTER OF CHARITIES REPORT ESG IMPACT

Research has found that just 23% of charities are referencing their ESG activity in their annual reports and websites. However, none are including a specific ESG section in their annual report. When it is covered it is referenced in a broader section covering a range of topics, finance firm RSM has found.

DONATIONS TO NHS AND MEDICAL CHARITIES TUMBLE POST PANDEMIC

Donors are increasingly shunning NHS and medical charities and focusing their gifts causes that support animal welfare, children, mental health and tackling poverty, Enthuse has found. The proportion of people who donated to NHS and



public health charities has fallen from 31% to 26% over the last year. Charities supporting mental health

are a key growth area of giving and it is now firmly established as a key cause among donors,

CHARITY COMMISSION LAUNCHES NEXT PHASE OF TRUSTEE CAMPAIGN

The Charity Commission has launched the next phase of its ongoing campaign to help trustees be ‘certain in uncertain times’. New to the campaign this year are a suite of animated videos. The campaign also includes new materials on safeguarding, the topic of a new 5-minute guide introduced in 2020. It is designed to drive awareness and uptake of the regulator’s 5-minute guides with the content and tone of the materials has been developed following user-testing with trustees.

CIOF TAKES OVER #GIVINGTUESDAY

The Chartered Institute of Fundraising (CIOF) is taking over the management of the UK’s #Giving Tuesday campaign from the Charities Aid Foundation (CAF). The global event launched a decade ago and has been run in the UK by CAF for the last seven years.

CHARITY BODIES STEP IN TO RUN SCC HELPDESK

The NCVO and the Foundation for Social Improvement (FSI) has taken over the running of support services offered by the Small Charities Coalition (SCC), which closed at the end of March. The move follows the announcement in December 2021 that the Coalition will close after failing to secure funding to continue supporting small charities. FSI and NCVO will now run the Coalition’s helpdesk and other support services to ensure small charities can continue accessing support.

REGULATOR FREEZES BANK ACCOUNT OF CHARITY WITH RUSSIAN LINKS

The Charity Commission has opened

a statutory inquiry into Jewish arts and heritage charity Genesis Philanthropy Group after three of its trustees were subject to financial sanctions by the government relating to Russia Oligarchs Petr Aven, Mikhail Fridman and German Khan have all been named as 'designated persons' by the government as part of sanctions brought in following Russia's invasion of Ukraine. Under the rules they cannot be trustees of a charity and the register has been amended to remove them from the charity's board. The charity now has one trustee listed, Gennady Gazin.

PRINCE'S TRUST AND MARVEL PARTNER UP

Young people have designed a superhero inspired clothing range as part of a linkup between Disney's Marvel comic book and cinema brand and UK charity Prince's Trust. The first clothing range from the partnership was revealed in March and is inspired by the comic and entertainment brand's Avengers characters. A second range of clothing from the linkup, focusing on female superheroes, launches later this year.

COMPLIANCE CASE OPENED INTO CHARITY WITH LINKS TO BORIS JOHNSON OVER PUTIN DONATIONS

The Charity Commission has opened a compliance case into the charity Downside Up, whose patrons include Prime Minister Boris Johnson, over funding it has received from Russian president Vladimir Putin. The charity, which supports people with Down Syndrome in Russia, is in talks with the regulator amid concerns around donations made to the charity through Putin's Presidential Grants Fund. According to the charity's accounts for the year ending June 2020 it received £263,993 in Russian government grants.



NINE IN 10 YOUTH CHARITIES SAY DEMAND IS RISING

Almost nine in ten youth charities say demand has increased for support, amid fears around young people's worsening mental health. A survey has found that 86% of charities that support young people say that demand has increased among 18–24-year-olds. A similar proportion (88%) say declining mental wellbeing among this group of young people is a major factor in the increased demand for help.

WWF UK BUYS MORE THAN 500 USED LAPTOPS FOR STAFF TO REDUCE CARBON FOOTPRINT

WWF UK has linked up with a computing firm to supply more than 500 refurbished laptops to its staff as part of the charity's long-term commitment around sustainability. Under the sustainable procurement policy it will buy pre-used laptops from Circular Computing that are at least equivalent to new products. The move follows a trial using 50 of the remanufactured devices.

OXFAM OVERHAULS ONLINE RETAIL STRATEGY

Oxfam has announced an overhaul of its online retail operation as it looks to expand its reach globally and maximise the value of its donations. It is to centralise its multi-channel retail operations via an e-commerce platform, being provided by Shopiigo. This will see its retail operation integrated with eBay, Shopify, Etsy and ShipEngine.

SOCIAL MEDIA TOOL LAUNCHES TO BOOST ONLINE GIVING VIA HASHTAGS

Charities including Shelter have signed up to an online fundraising tool that aims to boost online giving through hashtags. The hashtag initiative has been developed by online fundraising platform ThinkDonate and allows charities to activate hashtag campaigns across Instagram, Twitter, Youtube and LinkedIn. Charities can set up and activate campaigns using an online dashboard giving them access to QR codes for people to donate through.



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



Cost of living crisis

Charities are being urged to brace themselves for a fall in income from donations over the next six months as rising inflation continues to batter household income.

The warning has been made by the Charities Aid Foundation that found that six in ten (58%) of people plan to cut back on discretionary spending on non-essential items and services over the next six months.

The cutbacks are being made so that households can manage rising cost of living, including a dramatic hike in energy bills from this month.

The cutbacks are being particularly felt by younger people, with almost seven in ten (69%) of 25- to 34-year-olds looking to cut back on their discretionary spending.

Already CAF has noted a link between a fall in donations amid the cost-of-living squeeze. Last month just 25% of people donated to charity over the previous four weeks, compared to 29% the month before. This is a drop of two million people donating to charities.

Also last month one in ten people reported they plan to cut back on charity donations.

The drop in donation income comes as charities anticipate demand will increase as families struggle to meet rising costs. CAF says that nearly nine in ten charity leaders believe demand for services will increase.

“The cost-of-living crisis makes the value of charities’ work more visible than ever, while also placing these same charities under significant pressure as they seek to deliver their essential services and meet increasing demand from their communities,” said Alison Taylor, CAF’s chief executive of CAF Bank and Charity Services.

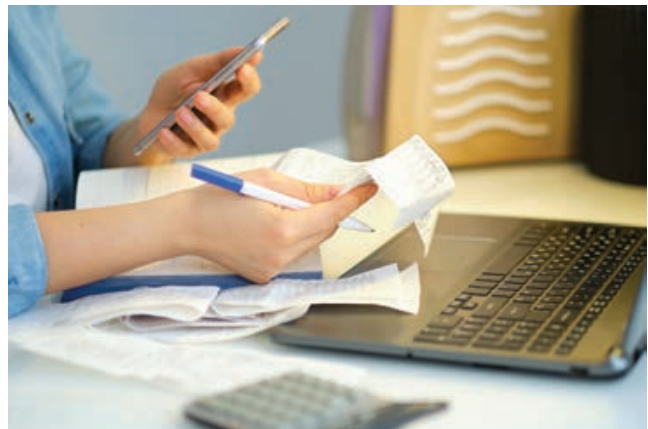
She urged charities to ensure donations are given effectively, through tax benefits, such as Gift Aid.

“There are also many other ways for people to support the work of charities that do not involve giving more money, such as volunteering your time and

Donations to plummet over next six months due to cost of living crisis, research warns

A FALL IN INCOME IS IMPENDING AS DONORS LOOK ON WAYS THEY CAN CUT BACK.

WRITTEN BY JOE LEPPER



skills, which can make a huge difference”, she added.

Separate research by think tank Pro Bono Economics recently warned that a ‘double wave’ of income losses amid the Covid pandemic, coupled with escalating inflation could leave the charity sector £8 billion down on previous estimates over the next four years.

Pro Bono Economics said the cumulative impact of the health crisis and inflation is creating a near £5 billion shortfall this year, compared to estimates made in 2019.

Based on projections for the next four years “in cumulative terms that would leave sector income more than £8bn down on the pre-pandemic trajectory” and warned that this figure could continue to grow in subsequent years”.

“Consider for instance that a £20 donation in 2021 will be worth just £17.60 in 2024. Similarly, a grant of £100,000 in 2021 would be worth just £88,100 by 2024”, warned Pro Bono Economics.

It added: “After two years of navigating the pandemic, charities are facing their own second wave. The severe drop in living standards and squeeze on household finances due in the coming months will have major impacts on the people who rely on charities for a range of services – from basic necessities to support with complex mental health needs.

“At the same time, charitable incomes will be impacted by inflation, by people’s ability to donate and by tighter departmental and local authority spending.” ■

Orlando Fraser

The government has confirmed the appointment of its preferred candidate Orlando Fraser as the next Charity Commission chair, despite concerns raised by MPs.

In their scrutiny of his appointment members of the Digital, Culture, Media and Sport select committee said that his selection had been "slapdash and unimaginative". Fraser had been rejected from a previous recruitment process that saw the government select Martin Thomas as the next chair.

However, Thomas was forced to quit late last year just days before taking office after it emerged he had been under investigation for inappropriate behaviour at a charity he had chaired. MPs also raised concerns over a lack of diversity in Fraser's selection and charity sector leaders had called for the appointment process to be rerun following the Thomas debacle.

But despite their criticism of his selection, the Department for Digital, Culture, Media and Sport (DCMS) has confirmed his three-year term. In a short statement, the DCMS made no mention of MPs' concerns and instead listed Fraser's career history and track record in the charity sector.

This includes serving on the Commission's board from 2013 and 2017 and his 30-year experience as a barrister. "Orlando's involvement in the voluntary sector stretches back to 1992, when he took an aid convoy to Bosnia to help its Muslim population," said the DCMS.

As chair Fraser will earn £62,500 a year for two and a half days' work a week. Among other concerns raised about Fraser's selection is his political links, as he had unsuccessfully stood for the Conservative Party at the 2005 general election.

His role as a legal member on the Charity Commission's board, when the regulator was forced to withdraw its guidance for charities during the EU Referendum, has also come in for criticism.

Govt appoints new Charity Commission chair despite concerns

ORLANDO FRASER HAS BEEN APPOINTED TO THE POST DESPITE HIS APPOINTMENT BEING REJECTED BY MPS

WRITTEN BY CHARITY TIMES NEWS TEAM



This is the second time that the government has appointed a Charity Commission chair despite MPs concerns. They also failed to endorse the candidature of former Conservative minister Baroness Stowell, who was appointed chair in 2018 despite MPs' concerns around her suitability.

The NCVO said Fraser's appointment "will be the second chair of the Charity Commission in a row not to receive the explicit backing of parliament" adding "this is disappointing". It urged the government to "look again at this process and work to ensure that future Chairs have the backing of parliament".

Alex Farrow, head of networks and influencing at NCVO said: "We have argued for a long time that parliament needs to be central to the process of appointing the Chair of the Charity Commission. The government should carefully consider the implications of continuing to appoint a candidate who does not have the backing of parliament.

Orlando Fraser



"We agree that Orlando Fraser has the experience and understanding of the sector required to do the job, and we were pleased that he stressed the importance of the independence of the Commission to the committee.

"We believe it was a mistake not to rerun the appointment process. This would have provided confidence in the process and enabled a more diverse and representative shortlist to have been developed."

ACEVO also released a statement on Twitter, asking the government to rethink its approach. "Alongside the others in the voluntary sector, ACEVO has repeatedly called for the appointment process for the next chair to be rerun in full and for greater diversity in the candidates.

"Therefore, ACEVO supports many of the conclusions in the committee's report.

"While Mr Fraser demonstrated the competency required to perform the role, it is vital that the leadership of the commission has the support of parliament, the voluntary sector and the public.

"The decision not to endorse Mr Fraser has been reached following cross-party public scrutiny and should be respected as part of the democratic process."

Political independence

The main issue surrounding Fraser's appointment centres on political independence – or a lack of. This was raised when Culture Secretary Nadine Dorries named Fraser, a former Conservative Party candidate, as the government's preferred choice to chair the Charity Commission.

Fraser unsuccessfully stood for the Conservative Party in North Devon in the 2005 general election, losing to the Liberal Democrats.

"There will understandably be concern about his links with party politics, even though he has not been politically active recently", said NCVO chief executive Sarah Vibert.

She added that charity sector leaders are "disappointed that the government has not taken this opportunity to appoint a person with full political independence".

Fraser is also a former board member at the regulator, serving from 2013 to 2017 and has chaired its governance and remuneration as well as its policy and guidance committees.

Fraser, who has been a commercial barrister for 30 years, said: "As I know from experience, the Charity Commission is a much-respected independent regulator, supervising world-class charities. I am honoured to be offered the responsibility of chairing it going forward."

He has also served on the NCVO's advisory council and on the management committee of a London refuge for victims of domestic abuse. ■

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



BARBARA KEELEY

Barbara Keeley has been named as **Labour's shadow minister for arts and civil society**. Before becoming MP for Worsley and Eccles South in 2005, she spent three years as a consultant for the charity Princess Royal Trust for Carers. During her time at the charity she advised and co-authored reports on issues around carers and primary health care.



CARLA PRIDDON

Adult literacy charity **Read Easy UK** has appointed Carla Priddon as its new CEO, beginning April 2022. Priddon joins Read Easy after 20 years in the charity sector, with the last five years at The Way Youth Zone. She replaces founder Ginny Williams-Ellis who retired from the role at the end of March, nearly 11 years after starting the charity in 2011.



JOANNA PRIOR

The **National Literacy Trust** has appointed Joanna Prior as its new chair. She replaces Dame Julia Cleverdon who served as chair since 2013. Prior is a leading figure in publishing, working in Penguin General Books over the last twelve years. Since 2014 she has held a trustee role, serving as vice-chair for the past three years.



LYNN PERRY

Barnardo's interim chief executive Lynn Perry is set to take the leadership role on a permanent basis. She has been named its new chief executive officer after more than 13 years at the charity, most recently as interim co-chief executive alongside Barnardo's corporate director of development and innovation Michelle Lee-Izu.



ROSS MALONEY

The **Ramblers Association** has appointed Scouts deputy chief executive and COO Ross Maloney as its next chief executive. He joins in July and takes over from Tanya Curry, who has been interim chief executive for more than two years. He leads an overhauled management team at the charity, which has seen three new directors recruited in the last year.

Appointments



CHRISTINE ROXBURGH

Scotland based **Eczema Outreach Support** has appointed Christine Roxburgh as chief executive, ten years after she first joined the charity as a volunteer in 2012; a year after the charity was formed having lived with the condition since birth. She later joined the charity's staff as head of services as well as interim chief executive officer.



GEMMA JUMA

The **Jack Petchey Foundation** has promoted its deputy chief executive to lead the organisation, following the departure of its CEO after 14 years in the role. Gemma Juma began in March, taking over from Trudy Kilcullen, who has been CEO since 2008. Juma joined the foundation five years ago as operations director before becoming deputy CEO last year.



GEORGE GILL

FRAME, a charity committed to reducing the number of animals used in scientific testing, has appointed former charity leader, fast-moving consumer goods (FMCG) specialist and veganism advocate George Gill to its board of trustees. Frame also held an 11-year tenure at the Vegan Society, initially as head of business development, and then as CEO.



SARAH VIBERT

NCVO has announced that Sarah Vibert has been appointed as its CEO with immediate effect. Vibert has been interim CEO at NCVO since January 2021. She was previously director of public policy and volunteering after joining the charity umbrella body in January 2020. Her appointment follows a four-month long recruitment process with more than 200 candidates.



SIMON BAILEY

Simon Bailey, former chief constable of Norfolk Police, and national police lead for child protection has joined **Embrace Child Victims of Crime** as its new chair. The charity's retiring chair Sir Paul Stephenson was 'keen' to continue his involvement with Embrace and has agreed to become the organisation's new president following his retirement.



MOHAMMED OSMAN

Spring Impact has announced Mohamed Osman as its new CEO. Since 2020, Osman has been Spring Impact's UK director, developing and leading the UK's office strategy and operations, as well as overseeing a portfolio of domestic and international projects. He succeeds Dan Berelowitz, Spring Impact's founder and outgoing CEO.

Diversity

THE ONE WHERE BOARD MEMBERS FIND OUT ABOUT EDI



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

There is a lovely moment in Friends when Chandler cracks a joke. Everyone laughs, including Joey, but when he thinks no one is looking his expression changes from merriment to confusion. I sometimes think equality, diversity and inclusion (EDI) is a bit like that. Everyone is supposed to know what we mean, but how many who don't really get it feel they have to play along as if they do?

This is particularly challenging for board members, who want to drive EDI forward, but don't know where to start. Here are some tips:

1. Check out the revised Charity Governance Code EDI principle

The Charity Code of Governance was updated in 2020 and one of the areas of focus is the EDI principle. This clearly sets out what is expected of trustees, but has your board actually read it? Two themes in the revised EDI principle are getting the culture right and accountability. The Code gives some helpful pointers for Boards that may be unclear about their role in shaping and driving EDI in their organisations.

2. Be honest about where you are on your learning journey

At Full Colour, we regularly come across well-meaning people who overestimate how much they know about EDI issues. When these people are trustees, this is problematic. Boards regularly make crucial decisions which have implications for EDI of which they may be unaware. It is fine to be at the beginning of your EDI learning journey but be honest with yourself about how much you really know. After all you can't plan a journey if you don't know from where you are starting.

3. Know what the words mean

While most are reasonably clear what 'diversity' means, they are hazy about other concepts covered by 'EDI'. These are Full Colour's definitions.

Equality is about evening out how power works, not to undermine expertise, experience or organisational hierarchy, but to ensure power

is not attached to that which does not add value.

Equity recognises that some people face more barriers than others and therefore need different support and resources to reach the same place.

Diversity is about having different kinds of people and the organisation "being" that difference, without diverse people having to assimilate and minimise parts of themselves that make them different.

Inclusion is about making the most of those differences. True inclusion involves bringing differences into decision making, problem solving, the development of ideas and strategies.

4. Surface and challenge your assumptions

What holds some organisations back on EDI is that they ask themselves the wrong questions, so come up with ineffective answers. These questions are often founded on assumptions that people are making, sometimes unawares. A question many organisations ask themselves is: "how can we get more diverse people"? Which leads to answers like "we need to advertise in x". The question and its answer assume that if only we could find a way to reach more diverse people, they would want to join us. How valid is that assumption? A better question would be "what is it about us that puts diverse people off wanting to join us"?

5. Embed EDI into your Board work

EDI has implications for everything a Board does, whether that's strategy, managing risk, budgets, approving annual reports and accounts, approving service strategies, scrutinising and approving internal policies. So stop side-lining EDI to a stand alone topic. Yes, you may need to have discussions when you are setting EDI strategy, but after that, make sure you are bringing an EDI lens to everything the Board does.

Trustees are of course volunteers. They are also leaders. Their role in leading and driving EDI is central to any organisation. So, if you are not doing this already, make the next Board meeting the one where EDI becomes part of who you are and what you do. ■

Leadership

"BREXIT, COVID, UKRAINE, CLIMATE EMERGENCY... AS THE CURSE HAS IT, 'MAY YOU LIVE IN INTERESTING TIMES.'"

We're living in interesting times' neatly encapsulates current operating conditions and what we anticipate for the short to medium-term future as well. As charity leaders, we can't ignore the prevailing conditions even though we have no control over what is happening economically and politically, nationally and internationally.

Powerlessness can be a trigger for paralysis and despair, but that is the least helpful of reactions. What can we do, as charity leaders, to support our teams, drive meaningful action and (dare I say it) hope?

Ask questions and listen – to your team, staff and volunteers (including your trustees). What are they worried about? There may be supporting actions you can take. For instance, at CFG we've taken the decision to hold two 'wellbeing weeks' during the current financial year. By closing for a short period, all our staff have a chance to recharge their batteries. We've seen a really positive benefit on morale and mental health through this approach.

Go back to the basics. What's your core mission? Has the pandemic taken you in a new direction? Have you changed what you do as well as how you do it? That's not necessarily a problem – but does your current and planned activity still fit with your charitable objectives and your values? This could be a good time to check everyone understands your mission and strategy – especially if you have team members who joined you during remote working.

"In teamwork, silence isn't golden – it's deadly." Communication between teams is crucial to working efficiently, effectively and with shared understanding. I've heard a lot about bringing people back into the workplace, but simply sharing a physical space doesn't automatically lead to successful internal communication – time to refresh your approach?

Listing potential risks can feel like we're in control but it can also be an illusion. Working through your risk register and reviewing it

regularly with your team creates opportunities to think creatively and plan appropriately. There comes a point though where planning for low likelihood issues (however high the impact) can be disproportionate.

In an increasingly interconnected, economically entangled world, events in distant places like the war in Ukraine need to be considered from a business perspective. Using Ukraine as an example, there is a direct impact on everyone's energy bills which will lead to increased supplier costs. The UK's National Cyber Security Centre has warned of a heightened risk of cyberattack. Charities and voluntary organisations should be reviewing and strengthening cybersecurity.

The sector press – Charity Times being a great example – and charity infrastructure organisations (including Charity Finance Group, but also NCVO, ACEVO, DSC and others) provide analysis, updates and guidance on a whole range of issues. At Charity Finance Group, our members can draw on our policy team's expertise. You might like to look at our Economic Outlook Briefing, which we co-authored with Pro Bono Economics.

Hope helps. The massive response of the VCSE to the covid pandemic shows the positive, creative and collaborative characteristics of humanity. Thousands of people have offered their spare rooms to people fleeing Ukraine, millions of pounds has been donated to the DEC Emergency Appeal and other campaigns. Even in the face of the worst cost of living crisis since the Second World War, people can be generous, compassionate, and act from love.

Don't ever lose sight of the good there is to see all around us; it should give us all hope to face whatever the future throws at us. ■

If you would like to write for Charity Times, or discuss any of the issues mentioned in this column, please e-mail: editor@charitytimes.com



**CARON BRADSHAW
IS CHIEF EXECUTIVE
OFFICER OF
THE CHARITY
FINANCE GROUP**

“Being a charity CEO is lonely”

A secret charity CEO documents some of their issues relating to charity leadership. In this piece, a CEO talks about loneliness at the top

I am in, right now, a cycle of failure. I keep having bright ideas to grow the charity and they keep failing miserably. I keep thinking “this is the magic bullet that will let us finally break through” and it keeps failing. Funders shake their heads (they don’t: they sit on an application for four months and then send a generic no), new websites fizzle out, promising contacts go quiet and a year later I am right back where I started.

I need a win. I need something to come off. I need to feel like I’m doing more than signing off expense claims and listening to trustees.

I’m told: “Success is going from failure to failure with no loss of enthusiasm” (it’s not Churchill, but often attributed to both him and Lincoln), but the problem is that I *am* losing enthusiasm, and I’m caught in a vicious cycle of expecting to fail. Sooner or later the staff have to notice that everything I’m trying is turning to ashes.

I feel like a football manager on a bad run of form. Sooner or later the chair of the board has to invite you in for a ‘quiet chat about your future’.

Of course, now the thought of being removed means there’s a personal incentive to try harder, to gamble more on success. To risk a perfectly good business model on a



quest for growth.

That’s the important word. Gamble. I’ve invested my own pride in the future of this charity and I want to see a return on my investment.

Deep breath.

This is where we step back. The problem isn’t failure. The problem is that it’s all on me. The problem is that I haven’t been open. I need to talk to my team. I need to say: “This year I want to double the number of people we help. These are the ways we can do it. A lot of them will fail, but sooner or later something is going to work”. I need to do all of the basic things like making sure everybody buys in; showing a clear

vision; and having honest discussions with staff about how we get there and what we are going to do when we get there. I need to do that because then it’s going to be “we need a win”, “we are trying lots of new things”, and “we’re going to keep going until something works”.

It turns out that every problem I have in this job turns out to be the result of withholding. The root of a lot of my problems turns out to be “I didn’t want to admit X to myself”, the root of a lot more turn out to be “I was embarrassed to tell X about Y”. All my stress and fear comes from some small lie and the best way of dealing with it always turns out to be finding out what the lie is and confessing it.

Being a charity CEO is lonely. I’m the pinch in the hourglass between staff below and trustees on top. That loneliness gets worse when I don’t share my authentic self. In this job I’ve had to learn how to read a balance sheet, work Wordpress, talk to funders, manage staff, and a dozen other things, but the most important skill that I’ve had to develop is this: being honest with myself. ■

If you want to submit a secret CEO (or other role) piece, or talk about anything mentioned in this piece please email melissa.moody@charitytimes.com

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Profile: Saleh Saeed



“We’re always fighting what feels like an uphill battle”

AS THE UKRAINE CRISIS ESCALATES, CHARITABLE ORGANISATIONS ARE STEPPING UP IN INCREDIBLE NUMBERS TO HELP THOSE IN NEED. MELISSA MOODY SPEAKS TO THE DISASTERS EMERGENCY COMMITTEE’S (DEC) CEO, SALEH SAEED ABOUT THE CHARITY’S WORK, THE NECESSITY OF COLLABORATION, AND LEADING THROUGH A CRISIS

explains Saleh Saeed, CEO of the DEC.

In the midst of his busy schedule, Saeed took time to talk with me about the work the DEC was doing in Ukraine; what goes into putting together an appeal of this magnitude; and what constitutes a crisis.

For the DEC to launch an appeal, there are three criteria: a disaster on such a scale and urgency that there is a need to call for swift international humanitarian assistance, so it wouldn’t respond in places such as the USA, UK or Japan, which would normally have the means to respond themselves. Secondly, does the DEC have member charities active in those countries who can respond effectively, and finally, will the public support an appeal? “For Ukraine, those three criteria were met very quickly, and we were able to launch the appeal incredibly quickly,” notes Saeed.

Collaboration is key

As the leader of an organisation in which partnership is so integral, collaboration is consistently at the top of Saeed’s priority list.

For a charity specifically focused on larger ‘disasters’, the threshold for crisis is much higher than perhaps a smaller regional charity

As I sit here writing this, the conflict in Ukraine has been going on for just over a month, with no end in sight. It’s easy to feel helpless whilst watching events unfold through the news and social media, but many charities have been working day and night to support those fleeing and still in the country.

One of the biggest charity appeals has been through the Disasters Emergency Committee (DEC), a collaboration between 15 international charities ready for crisis work, who are experts at getting aid to people who need it – fast.

To date, the DEC’s Ukraine Humanitarian Appeal has raised a staggering £260 million; £200 million of which was in the first two weeks alone. “It captured the imagination and the goodwill of the British public and others, to contribute to what is now our second-highest appeal since the Asian tsunami of 2004,”

which may have been significantly hit by Covid-19, and now the cost-of-living crisis. Nevertheless, the style of leadership and work it takes isn't all that different.

The DEC has some of the third sector's biggest names on its roster; the British Red Cross, Save the Children and Oxfam to name a few. That's in addition to its broadcast partners such as the BBC, ITV, Channel 4, Channel 5 and Sky, which all help to get appeals in front of the general public.

When asked about the challenges he's faced in his role, Saeed's response probably isn't much different to that of other charity leaders. "It always feels like there are never enough funds to complete the last. We're always fighting what feels like a very uphill battle." There's always a gap between growing humanitarian needs, he adds, in places like Yemen, Afghanistan, East Africa and Ukraine, and the ability the charity has to meet those needs. Unfortunately, it's likely to be a challenge that won't go away any time soon.

"I don't like people to think that we're just there sitting; waiting for a disaster to happen because there's a lot of other things happening around the world – many are what some would call silent emergencies or forgotten crises, whether that includes Yemen, or the Horn of Africa, which in places are one step away from famine and where millions of people are going hungry," he says.

Part of the DEC's mandate is that it must be ready to be called to action at any time, and that takes a significant amount of work. Saeed explains that what people see when the DEC launches an appeal is the 'tip of the pyramid'.

In addition to a core staff of 20, who are "highly committed experts", there's the staff of the charities and agencies it's partnered with and an extensive list of freelancers and volunteers who "drop everything" to come and support the DEC when it's called into action.

In 24 to 48 hours, the team grows from around 20 individuals to 70 or more, and that's partly where the necessity for collaboration and organisation comes in. In order for the team to grow that quickly, planning and preparedness within the partnerships is "key."

"I think the Ukraine crisis shows exactly how our partnerships work. Because to bring together all those different organisations and individuals in such a short space of time doesn't just happen. It needs to be planned.

And in a way, when you don't hear from the DEC, it doesn't mean we're not doing anything, it means we're doing critical work to plan for the next appeal; for the next crisis whenever that happens. "Putting any kind of competition or disagreements aside and really focusing on the humanitarian imperative shows what we can all achieve together, and it's incredible."

Leading in a crisis

The DEC by its nature is an organisation responding to disasters, emergencies, and crises around the world, but in theory, the way it works could be applied to smaller charities looking at ways to lead in a crisis. When Covid-19 hit, many charities had to turn to a form of crisis leadership and yet had no plan for it and were working on the fly.

"We can't do what we do in a form of chaos," Saeed states. "It has to be effectively planned, it has to be responsive, effective and strong. And to do that you need time to prepare and plan. If you start to try and do that while the crisis is happening, it's just impossible."

For Saeed, strong leadership is about building a strong and agile team and partnerships around the organisation that are able to collaborate efficiently and effectively between them so when a crisis happens, people understand their roles and what they need to do.

"But also a critical element, I think, is building trust," he says. Not everything goes according to plan and people will have to respond with agility and speed to make sure that the right things happen. In order to do that, you need leaders to build that position of trust amongst the team and partners to be able to move flexibly and quickly."

Talking to Saeed, it's clear to me how much he's valued collaborations and partnerships in not only his own work, but within the DEC's work – perhaps something more charities can learn from.

The cost-of-living crisis is expected to hit



charities hard with donations in the next six months expected to plummet significantly. It comes hand-in-hand with when the need for charities is expected to rise, with nine in ten leaders believing demand will increase.

"There's huge strength in collaborations, partnerships and organisations that work together," he continually reiterates throughout the interview.

Working together may be something that can help the sector, but it also comes with its own issues, too. For example, not every part of the sector is willing to make the changes that are being called for.

Diversity and inclusion forms part of our conversation; a challenge the sector is still actively working on. "Certainly in the networks that I'm in, there is a genuine desire to change. But I also can see that the sector needs to be more reflective of the communities it serves, and I see a genuine desire to grow and develop that bridge," he says.

A people person

It's obvious Saeed highly values those he works with and he considers himself both privileged and humbled to be able to lead "the national treasure" that is the DEC. It's an organisation that brings together "so many wonderful and

great people" and that has been able to mobilise millions of people across the UK, he says.

"I can't really say anything that tops that."

Saeed considers himself very fortunate that the people he works with make his life "incredibly easy," whether it be volunteers or media partners who drop everything on a weekend "or even Christmas Day" in order to help launch an appeal, or the people that the appeals that the DEC serve. "That's the people who sadly have no choice to live and cope through crises, be it people fleeing their homes in Ukraine or in my own country of birth, Yemen, where it's been in a state of war for seven or eight years.

"So when I am able to travel and get the opportunity to engage, interact, and meet such incredible people both here in the UK but also across the globe, I think is something that I really cherish and value. It gives me a great deal of reward in the work that we do.

"People often think that there's a sense of hopelessness or helplessness in countries affected by disasters or conflict, but despite the challenges of seeing people having to cope and live through those experiences, it's inspirational to see their resilience, their partnerships and the strengths that come out from such experiences," Saeed concludes. ■



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Slow and steady

Charity mergers among small charities are at a high, but so too are the immediate financial implications. Will those that have acted now reap financial benefits further down the line?

WRITTEN BY LAUREN WEYMOUTH



Patience is a virtue, and, in the realms of financial success, it can reap huge rewards. In fact, everything we know about financial investment suggests we should play the long game and invest now for benefits much further down the line.

But does the same apply to charity mergers?

Mergers within the sector are often reputed to be a good solution to financial distress, but is this really the case, and if so, how long does it take

to enjoy the benefits?

According to findings from Eastside Primetimers in the latest Good Merger Index, the number of charity mergers is at its highest level in five years. The increase is being driven by a rise in small charities involved in merger activity and takeovers, which are at record levels. During 2020/21, there were 77 mergers across the sector: the most since 2017/18. These involved 166 charities, which is also the

highest number in six years.

Mergers during the year include Adferiad Recovery and CAIS Hafal Welsh Centre for Action on Dependency and Addiction, which saw £21 million transferred.

Another was Bowel Research UK's merger with Bowel Disease Research Foundation and Bowel and Cancer Research, while takeovers in the last year included Douglas Macmillan's link up with the Donna Louise Trust.

A demand among small charities

Eastside Primetimers' report suggests that the increase in small charities involved in mergers "may well be symptomatic of ongoing financial pressures". The firm said that the increase in the number of takeovers is "more often driven by financial necessity rather than by strategic choice".

"Our data indicates that there has not been a significant shift in the combined income of organisations involved in mergers, but that there has been a significant drop in the value of income transferred," the report said.

"This is a product of the lower incomes of the organisations involved, and a fall in the number of more complex 'mergers of equals', particularly between larger organisations."

The total income of charities involved is £559 million, but the value of income transferred is £62 million, which is just under a third of 2019/20's figures of £176 million.

"There has been a fall in the proportion of organisations in surplus and an increase in the proportion in deficit in the year prior to merger. This may be an indicator of financial stress in the sector, and a factor in determining the other trends seen."

Financial pressures

The charity sector has been under financial pressure for some time. In part due to a lack of government funding, coupled with a wave of scandals at large charities that have driven a decline in public trust.

But in recent years, the level of income losses has accelerated. Earlier this year, a think tank warned that a 'double wave' of income losses amid the Covid-19 pandemic, coupled with escalating inflation could leave the charity sector £8 billion down on

previous estimates over the next four years.

Pro Bono Economics suggests the cumulative impact of the health crisis and inflation is creating a near £5 billion shortfall this year, compared to estimates made in 2019. Based on projections for the next four years "in cumulative terms that would leave sector income more than £8 billion down on the pre-pandemic trajectory" and warned that this figure could continue to grow.

Around one in four charities saw more than 40% of their income eroded by the pandemic, through shop closures, a dip household income and cancelled fundraising events were cancelled. As charities look to recover post-pandemic they now face seeing funds hit further by increasing inflation, which rose to 6.2% in the 12 months to February, a 30 year high.

"Consider for instance that a £20 donation in 2021 will be worth just £17.60 in 2024. Similarly, a grant of £100,000 in 2021 would be worth just £88,100 by 2024", Matt Whittaker, CEO of Pro Bono Economics says.

Economies of scale

Against this backdrop, it's easy to see why a merger might be a viable option. Paul Ridout, partner in the charity department at Hunters Law, suggests the reasons for mergers are not always primarily financial ones. However, he adds: "It seems reasonable to speculate that these smaller charities have responded to the financial pressures of the pandemic by looking for a "safe haven" for their services, probably in most cases with a larger charity that has the scale and resilience to weather the storm. The larger charity will be able to extend the range of services it provides without having to

add significantly to its operating costs."

"In the longer term, mergers can provide economies of scale and can give the merged charity an ability to bid for contracts that the pre-merger charities could not have taken on. They can also enable the merged charity to have a bigger presence in the sector and in the eyes of donors. All of these can put the merged charity in a stronger financial position."

Catherine Rustomji, partner at law firm, Shakespeare Martineau agrees, adding: "If a merger can go ahead, there are a number of benefits. For example, opportunities to streamline services, improved IT and working practices, and tighter financial oversight. Undoubtedly, mergers have a place in the future of the charities sector."

In the case of Bowel Cancer UK – the product of a merger between Bowel Cancer UK and Beating Bowel Cancer – financial benefits were felt almost immediately. The charity's CEO, Genevieve Edwards explains: "Bowel Cancer UK and Beating Bowel Cancer merged in January 2018 to create a single national charity for people affected by bowel cancer. Mergers initially give you savings in the short term for example there is no need to duplicate teams such as finance, HR, IT etc. or senior staff roles."

However, the charity is yet to understand the long-term financial impact. "Our income journey as a merged charity has been heavily influenced by the pandemic so it's hard to say for certain what impact the merger had on our finances but a clear strategy, a strong case for support and organisational culture strongly affects income performance following a merger," Edwards adds.

Mergers

Slow and steady

Pandemic aside, it isn't unusual for the financial impacts of a merger to take some time to come to fruition. "The time cost of key employees being involved in making a merger happen – and continuing to manage it – is often overlooked," Rustomji explains. "Therefore, charities should ensure that a merger won't negatively impact their ongoing responsibilities, particularly if the reason for merging is to overcome financial challenges."

"Depending on the extent of a charity's financial difficulties, a merger may not be viable. The merger partner must consider whether it is in its best interests to merge, should the other party be struggling. Taking on a financially failing charity, depending on the extent of such failure, could have undesirable consequences."

Ridout suggests the financial benefits are there, but can be "slow to appear": "Clearly there can be savings on staffing and premises, particularly if back-office functions can be combined, but this will vary tremendously from one merger to another," he says.

"The transaction costs of a merger can be substantial: over and above the management time that it will absorb, a merger can incur redundancy costs and require the charity to go through a complete rebranding exercise, and these, combined with the cost of professional advice, can mean that the financial benefits can be slow to emerge. However, in a successful merger those costs are anticipated and budgeted for, and the parties can enter into the merger with an eye to creating a stronger and more efficient charity in the longer term."

"Sometimes the immediate benefits are non-financial, such as a clearer combined mission, or an increase in the geographical area covered."



Beneficiary benefit

Regardless of the obvious financial benefits and pitfalls, mergers should never be acted on as a result of financial troubles alone. Tracey O'Keefe, head of Partnerships and Mergers at Eastside Primetimers stresses the importance of leading with beneficiaries in mind. "Financial benefit is highly individual to each merger case. What is true, is that it is really important that charities considering merger lead on beneficiary benefit - what are the 'reasons to believe' in terms of a merged service strategy?" she says.

"This should be closely followed by a business case showing the financial 'reasons to believe' of bringing the two/more organisations together. Alongside the due diligence process, this financial business case will help to inform the boards in their decision-making process around proceeding with a merger."

"This financial business case would ideally take a three-year view from the merger forward and reveal the costs/benefits associated. The costs of the merger itself would need to be accounted for, which means that

financial benefits are, for most, likely to be longer term rather than immediate."

So, while headlines would lead us to believe that mergers are on the rise, they are not an immediate solution to the financial crisis faced by many charities. Like any large-scale investment, they take time and careful planning in order to yield fruitful returns in the future.

"Whilst the pandemic is the obvious reason that there has been an increase in mergers in recent years, it is unlikely to be the only reason. Some may be borne out of financial difficulty or other pressures, but they are also an opportunity to improve and increase services being offered, enabling charities to better meet the needs of their beneficiaries," Rustomji says.

"As such, continued consolidation of the charity sector with strategic mergers, where it makes financial sense, is probable. However, a 'surge' is highly unlikely, due to the time and money that mergers take. Each one must be carefully considered on a case-by-case basis, rather than being rushed into," she concludes. ■

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How paid internships can secure young talent

More charities are looking at ways of attracting young people into roles. Could paid internships be the solution? **WRITTEN BY** TOKUNBO AJASA-OLUWA, CEO, CAREER READY

Securing young talent should be the priority of every employer. It's the most critical step we can take to ensure that we're set for future success.

In the past, this has often been difficult for us in the charity sector. After all, how can we compete with the salaries and benefits of the private sector?

Moreover, it can be difficult for young people from diverse and under-represented backgrounds to kickstart a career in the charity sector. A university degree followed by an unpaid internship (or two) is often par for the course when it comes to getting a foot in the door. While often understandable due to stretched finances, this has meant that the sector has cut itself off from a large pipeline of young and diverse talent.

It's imperative that this is changed. And the good news is that it could soon be.

Research from Bupa shows that there's never been a time when young people have been more attracted to working in our sector. As Generation Z are increasingly looking to work for employers who can enable them to live their values and make a positive social impact. One in three (31%) would turn down roles in companies with poor ESG credentials, and over half (54%) would take a pay cut to work for a



business that reflects their ethics, on average sacrificing more than a quarter (27%) of their salary.

Our priority now is providing young people with opportunity and access to kickstart their career in the charity sector, as their desire is clearly there.

At Career Ready, our research and experience show that paid internships are one of the best ways of making this possible. For 20 years, we've worked with businesses of all sectors to provide young people aged 16-18 from diverse and under-represented backgrounds with paid, four-week internships.

Not only has this transformed young lives and boosted social mobility, but it has helped employers to identify young talent and raise awareness of their sector, with 72% of employers saying they would hire their Career Ready intern and many then hiring them as apprentices.

We now want to ensure that

charities have the same opportunity to access young talent and transform young lives.

Yet we know that this can be a challenge, especially for smaller and medium sized charities. Due to limited operating costs, it can be difficult to find budget to host a talented young person for a paid internship. But it's an investment which we know will pay dividends for years to come, not just for each individual charity but for the sector as a whole.

That's why we're delighted to be working in partnership with the Bupa Foundation to launch an Internship Investment Fund for charities.

Available to charities with an income of less than £5 million, it will provide 17 young people on the Career Ready programme with a four-week internship paying the Real Living Wage. This will help the young talent to discover the rewarding careers available in the sector, gain vital workplace experience, and kickstart their careers, hopefully in the charity sector.

And by making this funding available to smaller charities, we hope it can serve as inspiration, as well as impact evidence, for larger charities on the business and social value of providing young people with paid internships. ■

DIGITAL FOCUS

Charity Digital Guide 2022

A guide to help elevate and inspire your charity digital strategy



DIGITAL FOCUS: Charity Digital Guide 2022



29 Case study: AI

How the charity CALM has been using AI to reduce the workload in its call centres and cut down wait times



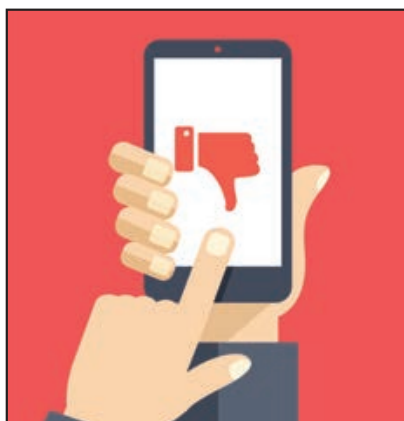
30 Digital influencers

We round up some of our favourite charity influencers to inspire your digital strategy



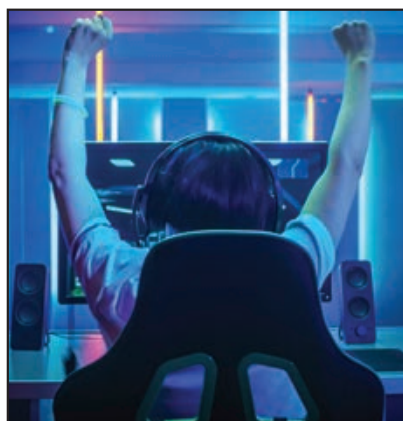
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How to support communities that may have been left behind due to a rise in digital services



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How to effectively handle online complaints and improve the public's perception of your digital activity



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A look at some of the key platforms for engaging with the gaming community

CASE STUDY

How a charity is using AI to cut mental health users' wait times



A look at how CALM has used AI to relieve some of the workload in its call centres

WRITTEN BY ANDREW WILKINS, CO-FOUNDER AND CEO, FUTR

QBot. It sits on CALM's website and is able to engage users 24/7, triage queries, service relevant help and advice content from the website, and connect them with an appropriate live agent. The AI-enabled chatbot has empowered CALM to become a 24/7 support service with a near-immediate response time.

The benefits of 24/7 availability are vast – and never more relevant than with charities dealing with people who are struggling with their mental wellbeing or in crisis. Manually handling calls at all hours is costly and requires a shift in infrastructure that is out of reach for most charities. Technology can fill this gap and it becomes increasingly natural for communication to take place in this way.

In the first 11 months of using the QBot, more than 26,000 connected users and 1.3 million messages were received. The automated service helped answer 52,500 questions with an average response time of 1.2 seconds and helped to reduce queue times.

Using AI to reach more people
The webchat function provides

people with an option to chat through text rather than voice to communicate how they are feeling. This can be a huge benefit to people in crisis, particularly younger 'digital natives' who can find it easier to communicate in this way.

AI can be implemented across multiple channels beyond websites, such as social media channels, instant messengers and WhatsApp, allowing users to engage with charities on any platform. And, importantly, the technology is capable of communicating in over 100 languages.

As a pre-developed plugin, it is affordable and speedy to implement – making it an ideal choice for many charities operating on a budget.

Technology implementation can also support charities' strategic development by capturing data which helps identify key and recurring needs of users and develop content to meet those specific needs. Charities are facing incredible pressures and technology can help ease the burden. For CALM, it needed to be able to direct resources, provide access 24/7, and reach service users on the channels and apps they are comfortable with. ■

The Covid-19 pandemic heaped unprecedented pressures on call centres, volunteers and care teams, who needed to operate remotely and often handled higher volumes of enquiries. This was the case for charity Campaign Against Living Miserably (CALM), which found that its volume of enquiries increased in lockdown. In 2021 CALM answered over 155,000 calls and chats; that's a call every 59 seconds and over one million minutes of talking to people.

As part of the charity's digitisation plans it was already looking to embrace AI to help relieve some of the workload on call handlers. But the onset of the pandemic sped things up. Futr was brought on board to support and provide technology to handle the surge in enquiries.

Technology can help engage users
Our chatbot and live chat feature was adopted in 2021 under the name

Digital influencers 2022

The charity sector is going through a digital revolution, partly due to the impacts of the pandemic and partly out of necessity. But it isn't doing it alone. With the help of some digital gurus, charities are storming into the digital age with new innovations, ideas and solutions. With this in mind, we've curated a list of some of the names of people we consider to be tech 'influencers' within the sector; those who have helped to excel organisations into modernity. This list is by no means extensive and there are a number of others who have also been influential in a digital revolution, but the below is a snapshot of some of the leaders within the charity digital space.

**Zoe Amar**

Chair, Digital Code of Practice

Zoe Amar is repeatedly featured on our round-ups, but we certainly couldn't leave her off this list. As chair of the Digital Code of Practice, Amar is one of the individuals that has been responsible for some of the drastic and long-lasting changes we've seen to the sector's relationship with technology. She publishes a yearly charity skills report, an annual barometer of digital skills, attitudes and support needs across the sector.

Dan Sutch

Director, Centre for the Acceleration of Social Technology (CAST)

Heading up the team at CAST, an organisation set to drive social change through digital technology, Sutch is another driving change in the sector. In addition to exploring new models of digital technology that create new approaches to addressing big social challenges, through CAST he is working with a number of organisations to help charities embed digital and design across their services, strategy, and governance.

**Lara Burns**

Chief digital officer, The Scouts

Passionate about enabling digital change and disruption, as chief digital officer of The Scouts, Burns has spent her career delivering digital innovation. In the last decade, Burns has driven digital transformation and strategic change at Age UK and The Royal Horticultural Society, where she has proven she's passionate about using technologies to increase the effectiveness of charities.

Helen Milner

Group chief executive, Good Things Foundation

Milner has been working for years at creating digital equality, including heading up The Good Things Foundation, which works towards that exact purpose. Working with parliament, she was a member of the Speaker's Commission for Digital Democracy and an advisor on digital engagement to the Public Accounts Committee. She was awarded an OBE for services to digital inclusion in the 2015 and was named as Digital Leader of the Year in 2017.



Jonathan Chevallier

CEO, Charity Digital

Joining Charity Digital in 2018, Chevallier has been working to help the sector move into the digital age. Improving digital awareness and access, Charity Digital connects charities to the digital expertise they need, raising the bar for digital skills within the sector. It's services were essential during the pandemic, and have helped hundreds of charities find digital deals to suit them and their needs.

Dave Grocott

CEO, Charity IT Association

The Charity IT Association (CITA) introduces charities looking to improve their technology capabilities to volunteers with appropriate IT skills and experience, and Grocott is in charge of it all. The association provides advice to charities on IT issues through matching them with a volunteer who can help, a service that has helped thousands of charities so far.



Hannah Bacon

Digital and innovation officer, WCVA

Pushing forward the digital revolution in Wales, Bacon is helping pull the Welsh charity sector into the modern age. She currently works on Newid: Digital for the third sector, a programme curated to improve the level of digital support available to the voluntary sector in Wales. Aiming to promote and enable good digital practice, it will share knowledge and capture insight from the sector.

Influencers

Ross McCulloch

Founder, Third Sector Lab

As founder of Third Sector Lab, McCulloch works with charities to help them use digital and social media to deliver objectives. He also founded Digital Trustees Scotland – a movement which aims to get a tech professional on every charity board. His work doesn't stop there, though, as he developed the SCVO Digital Senior Leaders Programme and runs the CharityComms Scotland Networking Group.



Donna White

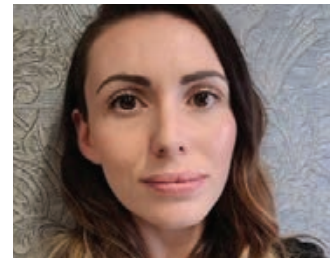
Senior head of digital marketing, The Prince's Trust

As the senior head of digital marketing, White has worked at The Prince's Trust for six years. She is focused on delivering innovative digital content solutions to grow The Trust's community of young people, supporters and volunteers. She has helped to set social media strategies, leveraging partnerships with L'Oréal Paris, NHS and Facebook to make the youth charity's message go even further.

Nikki Bell

Co-founder & director, Fundraising Everywhere

Bell helped to create Fundraising Everywhere, which launched pre-Covid and has proven to be extremely popular ever since. It has created an accessible online community where fundraisers can connect with peers, keep up with sector trends and learn new skills without leaving the house. Post-pandemic, she has been fighting to keep online events going, even when parts of the sector are determined to leave them behind.



Seyi Akiwowo

Executive director and founder, Glitch

After being elected the youngest black female Councillor in East London in 2014 at the age of 23, Seyi suffered online abuse and death threats. This inspired her to found Glitch, a non-profit that aims to save digital spaces from abuse, hate and fear. Akiwowo, nominated as a Digital Leader of the Year, now works globally with governments, NGOs and companies to protect online spaces with her "Fix the Glitch, toolkit.

OVERVIEW

Tackling digital exclusion



Charities have a crucial role in supporting communities and local government to tackle digital exclusion. The voluntary sector's knowledge in supporting traditionally hard-to-reach groups, such as the elderly and families living in poverty, is key to tackling the digital and social exclusion they face. Latest figures from Ofsted show that at least 1.5 million households have no internet access and 14.9 million people have low levels of digital engagement.

The regulator estimates that around 10 million people lack basic digital skills, such as accessing websites and filling in a form online. Digital inclusion charity, the Good Things Foundation, suggests several ways charities can boost communities' digital skills and address the challenges they face. Allaying fears around privacy and security are ways charities can get involved. According to the foundation, the threat of cyber-attacks is a fear among 1.3 million of digitally excluded people.

Addressing a lack of equipment and the cost of data are also issues charities can help with. More than a third of digitally excluded people do not have access to the right equipment, such as a tablet or

How to support communities who may be left behind due to the rise in digital services. WRITTEN BY JOE LEPPER

computer. Digitally excluded people are four times more likely to be poor, eight times more likely to be over 65 and one and a half times more likely to be from Black and ethnic minority backgrounds. As many as four in ten over 75s are believed to be digitally excluded, warns the foundation.

How charities are getting involved

'Digital skills bootcamps'

Charities Code Your Future and Resume Foundation are among organisations sharing £21m in West Midlands Combined Authority funding to improve their digital skills of 4,000 people across the region.

These are being provided through free 'digital bootcamps' that offer skills including coding, online marketing and cybersecurity. Those being targeted include unemployed people and those looking to develop their skills to improve career prospects.

Tech Lending Fund

The Charity Hubhub has partnered with Virgin Media O2 to lend equipment to organisations supporting digitally excluded groups, including those impacted by homelessness, and refugees.

Through its Tech Lending

Community Fund it has offered start up grants of up to £120,000 to set up Tech Lending Hubs to loan tablets to residents living in temporary accommodation. Applications closed

in March with the successful bids to be announced in due course.

Digital banking for the homeless

Charities supporting homeless people in London are being helped through a tech for good initiative by Fintech company, Pello Capital.

This gives homeless people digital banking cards that will allow them to collect donations that can be spent via an approved list of sellers. These NFC (near field communication) cards also give them access to a digital PO box and a temporary address to apply for ID and banking. The pilot scheme aims to be rolled out across London to support 10,000 rough sleepers.

Supporting digitally excluded patients

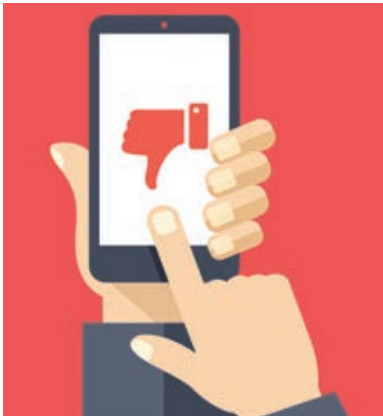
NHS Charities Together invested £1.1million in funding to tackle digital exclusion faced by patients in North West London. Funding is being used by the charity CW+ with the Chelsea and Westminster Hospital NHS Foundation Trust. Also involved are Age UK and Open Age to support older people.

Through the scheme patients will be offered digital skill training and access to a live webinar channel, offering online support, including mindfulness and exercise sessions.

The project aims to reduce "barriers to digital access" and improve "connection with communities" said NHS Charities Together CEO Ellie Orton. ■

TOP TIPS

How to head off online complaints



Charities' increasing use of digital to fundraise and engage with the public has brought huge benefits in terms of recruiting supporters and attracting donations to the sector. But this growth in online activity has also seen a rise in complaints.

Figures published by the Fundraising Regulator in 2021 showed a 252% increase in online fundraising complaints.

In the year ending March 2021 a total of 56 charities reported receiving almost 6,000 complaints. This is the first time that online fundraising has been the most complained method..

Public complaints direct to the regulator about online fundraising are also up. From 56 in 2019/20 to 84 in 2020/21.

The regulator has promised action to tackle this increase in online complaints, pledging to "consider where existing standards" in its Fundraising Code "related to digital fundraising are sufficient to support

The growth in online activity has many benefits for charities, but it doesn't come without a few problems.

WRITTEN BY JOE LEPPER

the sector".

In the meantime, there is plenty charities can do now to head off online complaints.

Be transparent

A key theme to merge in complaints is concerns about misleading information. The Fundraising Regulator urges charities to be clear about what the money will be spent on.

This includes offering online users clarity over whether money is being raised for a specific project or if it is to maintain the day to day running of the organisation.

Many fundraising campaigns have targets. Charities are urged to ensure they explain clearly what happens when goals are reached.

Pay attention to presentation

The Fundraising Regulator warns that "something as simple as website layouts can inadvertently mislead donors". It urges charities to take time to review information provided, where it is placed and its context. This can ensure clarity over what funding will be spent on.

Attention to presentation can also ensure online content is jargon free, easy to understand and offers sufficient information to help viewers make an informed decision.

"Try to view it through the eyes of an individual who does not have

access to any other information about the cause," recommends the regulator.

Be open to scrutiny

Increasingly, many charities, including the RNLI and National Trust, have found themselves on the frontline amid culture war debates, whether it be over rescuing asylum seekers or addressing the slave owning history of stately homes.

The Regulator urges charities to be open and helpful to those who do not want to support their cause.

"Be ready to answer questions openly and helpfully," says the regulator, adding, "be prepared to back up any claims with evidence where necessary".

Be consistent

The public is less likely to complain about charities' direct mail compared to its online communication, according to figures for 2021.

This suggests that the public are more welcoming and trusting of information they receive from charities in the post.

Charities are urged to ensure their online communication mirrors the success of their mail shots, by offering the same consistent messaging as well as details about where the money will be spent. ■

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Gaming for Good survival guide

We look at some of the key platforms for finding and engaging with the gaming community and influencers, as well as recent successful Gaming for Good initiatives.

WRITTEN BY JOE LEPPER



Charities are increasingly linking up with the world's growing gaming community to create engaging fundraising initiatives.

These 'Gaming for Good' campaigns can be highly successful for charities, with millions of gamers globally keen to help good causes through their hobby, or indeed profession when partnering with the

most popular influencers in the gaming world.

A desire to offset the high levels of energy involved in gaming is among many powerful motivating factors for gamers to support good causes.

Such Gaming for Good link ups usually involve engaging streamers and using streaming events to raise awareness and funds for charities.

These are sometimes sponsored marathon gaming streams, or short tournaments.

Here we look at some of the key platforms used to find gamers and how to engage with the gaming community and influencers. We also share some of the many recent successful Gaming for Good initiatives.

Where to find gamers

Twitch

Since Twitch's launch more than a decade ago, this live streaming platform for a range of content, has seen extraordinary growth, increasing its average concurrent viewing figures from 102,000 in 2012 to 2.28m in 2022.

The number of gamers creating content has also seen massive growth, from 300,000 monthly broadcasters in 2012 to 8.49m this year. Young people are its main audience, with seven in ten viewers aged between 16 and 34, attracting to content around popular games including Elden Ring, Grand Theft Auto V and League of Legends.

Discord

Discord differs from streaming and Twitch as it is an instant message and communication app not a social

media platform. It is increasingly popular among gamers as it creates conversation and communities around content.

Through this app gamers can invite people to join chats in 'servers' while playing a game on a console or PC. Popular gaming servers on Discord include The Pandemonium and Friendly Realm.

Meanwhile, Discord's Guild Discovery section profiles servers for specific gaming related content.

Youtube

YouTube was once the go-to platform for gamers but has since been overtaken in popularity by Twitch.

Nevertheless, it is still influential and widely used by gamers looking create and watch content. In the last quarter of 2021 Youtube Gaming Live generated more than a billion hours of content.

Facebook

Gamers are increasingly using Facebook Gaming to stream and watch content. Its market share by 'hours watched' grew from 1% in 2018 to 3% a year later.

By 2021 it had moved past the one billion hours of gaming mark for the first three months of the year. By the final three months of 2021 YouTube Gaming had overtaken YouTube Gaming in terms of hours watched

Tips on recruiting gamers and influencers

Charities are advised to target top influencers as well as the vast army of small-scale gamers creating content. This ensures charities can create as large an audience as possible, as well as target the top gaming influencers of the future.

This can be through search tools such as through PowerSpike, which

can search for streamers by a range of filters such as location, genre and average views.

Using the hashtags #Twitch and #gaming on Twitter can also provide interesting lists of gamers and their interests.

Meanwhile high-profile influencers with millions of followers can be found via Twitch's front page. This includes Tyne 'Ninja' Blevins, who is the most popular gaming streamer on the platform with 17.5m followers. Another is Turner 'Tfue' Tenney, who has 10.9m followers.

Another way of finding gamers is to look within charities themselves. From volunteers to staff members, there will be a proportion who play games and already have a good idea of who the key gaming influencers are and which ones would be keen to support charities.

Charities can also develop interesting campaigns that can engage gamers, who are mainly young and often keen to support good causes but are not sure how.

Success stories

Blue Cross - Paws 2 Play

Creating a buzz in the gaming community is key to a successful Gaming for Good campaign. Animal charity Blue Cross has done just that for its Paws 2 Play initiative, which targets all gamers, influencers, and streamers, irrespective of following.

Its 2021 campaign engaged gamers by pitting dog and cat lovers against each other. They were then encouraged to share content about how they are raising funds through the campaign with the hashtags #TeamDog or #TeamCat on social media. This campaign was called the 1897 Challenge and focused on the charity's heritage by referring to the

year it was formed.

It raised more than £50,000 for the charity, double the original target, and involved 650 participants.

This year's Paws 2 Play campaign is called Festive Quest and is inviting gamers to take part in 12- or 24-hour gaming or streaming marathons ahead of Christmas. How people can compete is up to them, either playing in one session or an hour a day.

The campaign's flexibility, interactive focus as well as rewards for those taking part makes this one of the most engaging Gaming for Good events in the charity calendar.

Institute of Engineering and Technology - Fortnite Tree Planting

In 2021 the Institute of Engineering and Technology, along with e-sports firm Guild, staged a Gaming for Good event around the game Fortnite, where players are flown to a world where they combine survival, shooting and construction skills.

Through the charity's initiative players were encouraged to chop down as many trees as they can in the game. These felled trees were then tracked with real trees planted to replace them.

Influencers including Henrik 'Hen' McLean, were among those taking part in the event which was ran through the Institute's Difference Makers sustainability campaign.

More than 500 trees were replaced through the event, which perfectly matched up a good cause with gamers' interest in the environment and the dynamics of a specific game.

The event also met the Institute's aim of encouraging young people to study STEM (science, technology, engineering and mathematics) subjects. ■

FEATURE

Leaving a legacy

The level of income from legacy giving is increasing year-on-year. But how can smaller charities get a piece of the pie? **WRITTEN BY MELISSA MOODY**



We all want to be remembered when we die, and one increasing way people are aiming to do that is through leaving a gift to a charity in their will.

According to research, around 40% of all UK deaths result in a will at probate, and 16% of those wills are now charitable, up from 13% in the late 1990s. On average, there are 3.3 charitable gifts per will and 38% of charitable wills contain just one bequest; 28% include four or more.

Legacy Foresight's latest Legacy Market Briefing found that UK

legacy income will total £19 billion over the next five years, climbing to £23 billion in the five years after that, suggesting that by 2030, UK charities will receive £5 billion per year in legacy income from around 146,000 charitable bequests.

Traditionally, most legacy incomes usually go to the largest, most well-known charities. The National Trust, Cancer Research and the RNLI often top the list, with the RSPCA, Macmillan Cancer Support and PDSA following closely behind. However, this may be changing. Legacy Foresight has found that

medium (£1m-£10m) charities have reported an incredible five-year growth rate of 6.3%, suggesting that there may be a slice of the pie left for some of the smaller charities.

Changing things up

So how can smaller and medium-sized charities encourage more legacy income?

Currently, the type of charity has a lot to do with it. Legacy Foresight's research found that the fastest-growing subsectors over the last 10 years have been air ambulances at 14% and wildlife trusts (13%), followed by arts and education charities, NHS hospitals, and mental health charities, all ranging between 7% and 8% per year.

Rob Cope, director of Remember a Charity, which works to encourage more people to leave a gift in their wills, explains that the market has broadened, with over 10,000 charities benefiting from bequests a year; a number that is only increasing.

"Health tends to be more front of mind at the end of our lifetime and charities in this space have done particularly well," he notes. "And let's not forget we're a nation of animal lovers too."

The British Heart Foundation has found just this and been able to significantly benefit from the public's generosity. It receives roughly 50% (nearly £80 million) of



its annual income from legacy donations, some of its techniques are perhaps things smaller charities can learn from.

As we know, the causes the public put their heart, and money, towards can change quickly. In the wake of Covid-19 it's logical that health and NHS charities are more popular, and even environmental charities can expect to see a boost as climate change stories hit the news. "The arts and environmental organisations are among many causes that are gaining market share," Cope adds

But that doesn't rule other charities out. As legacy income has increased, it makes sense that people, and charities, are more willing to talk about it.

"Generally, charities are becoming much more open about their legacy

fundraising – they aren't afraid of being creative, emotive, and humorous even," says Cope.

"They're talking about it more with supporters, so public awareness is growing and, of course, digital solutions are making it easier to write a will. As a result, many of the barriers are gradually being knocked down, more charities are being named in wills, more causes are benefiting and that's fantastic."

Keep on communicating

Cope notes that another change is how charities communicate.

"Traditionally legacies were promoted through TV or [direct mail] campaigns, but online and digital works really well in this space and that's helping to level the playing field for smaller charities,

which is so important."

As more digital-centric generations grow older and we spend more of our lives online, changing the way charities communicate about legacy income could be one of the biggest drivers in donations.

"We're drawing closer to the largest transfer of intergenerational wealth with the baby boomer generation and expecting even more growth in legacy income," explains Cope.

"But it's important to recognise that it's also an increasingly busy market. Charities will need to continue to invest and champion the legacy message or run the risk of losing out to others who do."

Meenaxi Patel, head of legacy management at the British Heart

Legacies



Foundation explains that communication is a significant part of their strategy. “As well as promotion of legacy giving across our digital and social channels, the BHF have partnered with will-writing specialist Farewell and the National Free Wills Network to offer our supporters the opportunity to write or update their will for free, either online, on the telephone or in person with a local solicitor,” she says.

“Those who use the scheme are under no obligation to leave a gift in their will to the BHF,” she adds.

Partnerships like this help to spread the message about legacy giving, and although perhaps not something smaller charities can undertake, they can use their own advantages.

Smaller charities can have an advantage over larger charities in that they have a much smaller group of supporter relationships to manage, and therefore are more likely to have

personal relationships with key donors, volunteers, and influencers. They can use existing communication channels and incorporate legacy messages into these.

Looking forward

So what about younger generations? Are they likely to give as much as previous generations did?

Cope says that consumer polling suggests they are more likely to leave a gift “but this can be a bit of a red herring,” he adds. “The reality is that most haven’t done it yet and many will change their minds and wills over the years.

“The good news is that they are certainly very positive about legacies. The challenge is to keep championing the legacy messaging throughout their lifetime.”

In a small charity, it may be that currently, legacy giving is an afterthought, but to be successful in it, it needs to take a bit more focus,

and time.

Remember a Charity says charities who have successfully developed legacy fundraising keep an eye on the long-term whilst balancing this against current and short-term needs. It may not be easy, but the payoff could be significant.

It’s obvious that legacy donations are a key source of income for many charities, with that number growing year-by-year. Cope agrees, calling the donations ‘transformational’. “Most gifts are unrestricted and that’s critical – enabling charities to use the money where its needed most. As we saw during the pandemic, this income can be what brings charities back from the brink.”

“The more we talk about it and normalise the concept – particularly with the predicted surge of donations from baby boomers, the more charities will be able to benefit for generations to come,” Cope concludes. ■



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How can charities support Ukraine?

In the midst of the crisis, what can third sector leaders do personally and professionally do help? **WRITTEN BY MELISSA MOODY**

With the situation in Ukraine dominating the news, the public is wondering how they can help, and a lot of charities are wondering the same thing. Below, we take a look at ways the sector can support Ukraine.

UK-based donations

There's a number of global charities operating in the UK and Ukraine, which are already set up to receive donations and help on the ground. These will be well-equipped to handle the amounts coming in, and have processes set up already – perhaps a safer option than charities set up in the wake of the crisis.

In addition, donating supplies like blankets or baby formula means transporting goods hundreds of miles, whereas cash can reach people quickly to buy what is needed. Among organisations collecting funds for Ukraine are:

British Red Cross: The charity has launched an appeal to help Ukrainian Red Cross to provide food, medicine, clothing and shelter as well as first aid training and drinking water to villages and cities.

Disasters Emergency Committee: The DEC, an umbrella group for 15 of the UK's leading aid charities, is also running an appeal, donations to which will be doubled by the

government up to a total of £20 million.

UNHCR: The UNHCR refugee agency is funding emergency shelters, repairs for homes damaged by shelling, emergency cash assistance, psychological support and warm clothing.

UNICEF: The UN's children's charity is helping to ensure families have clean water and food and that child health and protection services continue

Any charities fundraising should be aware of the risks. The Chartered Institute of Fundraising's head of policy and external affairs, has written an excellent blog on fundraising in the context of an emergency. Daniel Fluskey's recommendations include being as accurate and clear in your appeal as possible, being able to answer questions on how and where donations are being used, and taking into account how supporters and the public will feel at being asked to help in a time of emergency.

Welcome refugees

A UK Homes for Ukraine scheme allows individuals, charities, community groups as well as businesses to sponsor refugees fleeing Russia's invasion and bombing of Ukraine.

Under the scheme sponsors can nominate a named Ukrainian or Ukrainian family to stay with them in their home or a separate property.

Charities are also involved in connecting individuals for sponsors who do not have a named contact.

Those arriving from Ukraine will be granted three years leave to remain, as well as entitlement to work and access benefits and public services.

Campaigning

Governments have responded forcefully, but as charities know, there's always more to do. Around 50 civil society leaders wrote a letter in *The Times* calling on the UK government to do more.

Freedom from Torture also posted a thread on Twitter on how to support Ukrainian refugees, and launched a petition.

Protests in the capital have been organised by London Euromaidan and the Ukraine embassy to keep up the visible pressure and show solidarity.

Solidarity

If you are a disaster relief or humanitarian charity, you are still likely to be in crisis mode currently. If your work doesn't touch these areas, it can be hard to know how to



respond. Is it insensitive to broadcast your everyday news and events? You'll have to decide on a day-by-day basis as the situation changes. People still need good news and other work doesn't stop during this time. But it is worth reviewing scheduled messaging, stopping any campaigns if needed and being conscious of the language or images you are using.

Even if your organisation is unable to support Ukrainian's directly, showing solidarity is also an option. Many organisations are sharing messages of unity with Ukraine. A

few have changed the colours in their logos, this could be an option for you.

Be aware

The situation with Ukraine has moved very quickly, and as a consequence the Charity Commission has issued advice. It issued a statement reminding trustees of its guidance on running effective and impactful appeals, and holding, moving and receiving funds safely.

The watchdog also urges charities to ensure they "know their donors",

and consider whether or not to accept donations, including the chance of any reputational implication in doing so. It has guidance on this as well as on managing risks when working internationally.

The Commission expects to see other implications for charities, both short and long term, and will promote or update its guidance when necessary. Charities are encouraged to keep an eye on its gov.uk pages for updates and to get in touch with its contact centre with any specific questions or concerns. ■

Researching the impacts of Covid-19: What can charities learn?

Daniel King has been busy researching the effects of the pandemic on the charity sector. Melissa Moody catches up with him about some of his findings.

QUESTIONS BY MELISSA MOODY

Melissa: What made you decide to start researching the impact of Covid-19 on the voluntary sector?

Daniel: I used to work in the sector and my PhD was based on running a small non-profit arts organisation. As the pandemic hit in early 2020, we could quickly see the impact it was having on the voluntary sector, and there was a real focus on the need for good information about our understanding, as a sector, of the impact it was having.

The business sector has got a well-developed, and quite historic, understanding of impact – particularly through quantitative data.

Unfortunately, there is no real equivalent in the voluntary sector. There are lots of surveys sent around, but nothing quite UK-wide; nothing that's got depth and consistency. We were also doing some work with DCMS (Department for Digital, Culture Media and Sport), so we already had quite good connections within government and through that we were very keen to try to create research that could help inform policymakers as well as practitioners.

Melissa: What have been some of the main findings that have stood out to you through this work?

Daniel: Covid-19 obviously had lots of negative effects on the sector, such as crunches in funding and other challenges that organisations faced. But it has also been an opportunity for innovation, building relations and breaking down barriers. It was very evident how quickly voluntary community organisations moved in response to the pandemic; for example the way in which silos were broken down between the public sector and the third sector. Suddenly in that moment of crisis, people worked together in ways that maybe they didn't do before. It opened up opportunities for collaboration.

We've also seen the importance of some aspects like infrastructure, but I think is often downplayed and isn't seen as important. Then there's a wellbeing crisis that's still very much there. There's naturally lots of burnout and exhaustion and I think that provides real challenges for organisational leaders. There's a notion that we're back to normal but people are still struggling. There are

big questions now around whether we can now take the innovation, creativity and flexibility that we've learned and make them become more normalised.

Melissa: How did you go about research?

Daniel: We've got three strands to our database. We've got our barometer, which was a monthly temperature check on the sector, and we very deliberately based that around some of the business surveys with a core set of questions. And then we also rotated thematic questions as well. I think that gives people the most comprehensive guide as we had between about 350 to 700 responses a month.

The second one is a panel survey, where we talked to just under 300 organisations and tracked them through 2021 looking at crisis leadership. The final element was interviews – we've done 300 in depth interviews. We will be putting this in what's called the UK Data storage service so it'll be available for researchers in the future. And I think it gives a social history of how people have gone through the pandemic.



Melissa: That sounds really interesting. It sounds like you're really passionate about the subject.

Daniel: Yeah, it's a very interesting and unusual time. I think there's an important question to ask about good data in the sector. How do we make decisions? How do we open that up for the government but also for organisations themselves? For trustees, for managers? On what basis are decisions being made? And if you compare the charitable sector to the business sector, you'll see that the charity sector is lightyears behind.

I would really suggest organisations take the opportunity to pause, reflect and learn about what's worked well and what hasn't worked well internally and externally. The stock-taking, learning and reflection moments are really important if you want to move forward.

Melissa: Finally, what are the next steps for and the research?

Daniel: One of the things that we are doing is preparing the data so it is available for researchers. We were funded by the ESRC (Economic and Social Research Council). One of our commitments is to make the enormous pool of data that we have got available to everyone. Not just to ourselves, but to others too. It won't be available just to academics, that could be other researchers in the voluntary sector.

The second part is that across 2022, we're going to be running a series of events to discuss some of the key themes we've identified. So, for example we're looking at funding and funders' behaviour; diversity and inclusion; and a variety of other areas as well.

We want to take these issues and do a little bit of a deep dive by really

trying to engage with people across the sector in policy and in practice.

The third thing we're thinking very deeply about is an observatory to the sector; a way in which we can create a more definitive space and place for data that can be relied on.

The idea is to create something that would then become more useful for trustees or policymakers who are responsible for making decisions in and around the sector.

In the future, we want to support or lobby, so we're trying to explore what that might look like. That's quite a long-term project for us and I can't guarantee it will work, but I think it'd be an amazing thing for us to do. ■

For more information, visit: <http://cpwop.org.uk/respond-recover-reset-barometer-dashboard-archive/>

How the pandemic and war will shape the investment landscape

A look at how the current climate will shape the potential for investment growth

WRITTEN BY SUBITHA SUBRAMANIAM, CHIEF ECONOMIST, SARASIN & PARTNERS

On the 24 February, Russian tanks entered Ukraine in an act of war that will affect geopolitics, military alignments, trade alliances and currency regimes for years to come.

The post-Cold War peace dividend has been squandered by an autocratic regime. Less clear is the path that geopolitics, economics, trade and finance will take as demand and supply patterns that were disrupted by the pandemic face further multi-year shifts.

The pandemic and the war reinforce three themes that were already underway in the world economy. These are:

- Accelerated adoption of new technologies
- A mounting imperative to share prosperity more widely
- De-globalisation caused by competition between liberal democracies and autocratic regimes.

Tech-celeration and the pandemic leapfrog

Just three months after the pandemic hit, “Zoom” entered the Oxford English Dictionary, a reflection of the technological leapfrogging that has occurred.

Now, investment in automation and digitalisation is being driven by extreme tightness in labour markets. Employment usually takes time to recover after a recession - almost a

decade in the case of the 2008 financial crisis. After Covid-19 it took just 20 months. Any capacity left in labour markets has been wrung out over the past year as businesses compete for workers, and upward pressure on wages is encouraging digitisation and automation in a bid to mitigate labour costs.

A further strand of tech-celeration lies in the restructuring of supply chains. Lockdowns created huge gyrations in consumer demand, and global supply chains were unable to cope. The resulting shortages will be exacerbated by the war in Ukraine. In response, businesses are endeavouring to ensure resilience in supply chains by bringing them closer to home, building redundancies into supply networks and increasing automation.

Sharing prosperity

The second theme is a concerted effort to share the gains of prosperity.

Over the past two decades, businesses have shifted their spending away from long-duration investment in areas such as factories and transportation in favour of shorter-duration expenditure in information processing and intellectual property.

Again, this has meaningful consequences for the labour market.

Digitalisation and automation reduce demand for lower-skilled roles, widening the gap between haves and have-nots and providing fertile ground for populist policies at both ends of the political spectrum.

The traditional remedy for inequality is to tax the rich more and transfer wealth to the less well off, but as we have seen in the US, the Biden administration struggled to achieve tax increases, despite enacting fiscal stimulus of almost \$2.5 trillion.

Instead, we anticipate measures designed to level the playing field, such as greater investment in health, education, infrastructure. However, higher levels of social spending without commensurate tax increases mean that fiscal deficits are likely to rise.

Global rivalry is growing

A third, and possibly the most impactful trend, will be escalating competition between the liberal democracies and the more autocratic regimes of Russia and China. This will spill over into global trade, finance, defence and security arrangements.

Since the end of the Cold War, we have enjoyed a peace dividend that brought prosperity and, with the integration of Eastern Europe and China into global trade, tremendous improvements in living standards.

Political climate



Alongside these advances, rivalry between China and the US has grown. Russia's invasion of Ukraine has pulled China closer to Russia and brought out into the open the conflict between liberal democracies and autocracies.

We are entering an era of Great Power competition where security and defence arrangements will be restructured and the globalised market for trade and finance will pull apart. Moreover, the aggressive use of financial sanctions has turned the dollar payments system into a tool of war. Autocracies, which own roughly half of the \$20 trillion in global reserves held by central banks and sovereign wealth funds, are currently vulnerable to financial sanctions that work primarily via US dollar payment systems. Over time, however, sanctions will incentivise the adoption of alternative payments systems that bypass western banks.

Trade will follow the shifts in finance, with imports and exports gravitating towards allies. The US dollar's dominance may therefore be eroded unless the US ramps up its use of soft power to win over allies.

As Great Power competition heats up, defence spending will rise across the world.

The Great Moderation is ending

Tech-celeration, levelling up and great power competition will together create an environment of enormous flux; the Great Moderation, whereby volatility in economic activity and inflation consistently trended lower, is ending. In its place, we can expect shifts in activity as the state expands, technology grows more powerful and new alliances are formed.

With higher spending on defence, energy security, energy transition, health and education in the pipeline,

pressure on public finances will grow and debt levels risk becoming unsustainably high.

Pandemics and war are inflationary because they disrupt supply much more than demand. We expect inflation to moderate as supply chains normalise, but not return to pre-pandemic levels. Instead, we expect inflation to run at 2.5-3% over the medium term. The risks are clearly to the upside. If the supply side of the world economy remains impaired due to persistent shocks, inflation expectations will rise and we may see wage inflation drive price inflation.

Although central banks are keen to dampen inflation, interest rates are likely to remain relatively low, to help manage high debt levels and rising deficits. Meanwhile, central banks are likely to tolerate moderate overshoots of inflation targets to reduce the real value of debt, while governments are likely to use regulatory powers to ensure that banks remain significant buyers of local government debt.

A time for active management

We expect inflation to ease back from its current peaks, but investors must learn to live with elevated inflation and seek out real assets that have the potential to protect against its corrosive effects. The coming years will be a more volatile environment for growth. In such conditions we can expect greater dispersion between winners and losers that rewards well-researched, focused active management. ■

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INVESTMENT

Multi-Asset Funds	Investment Manager	Fund Size (£m)	Cash %	Bond %	Equities	
					UK %	Intl %
Barclays Charity Fund	Barclays	250.6	2.7	18.2	22.3	48.2
Armed Forces Charities Growth & Income Fund	BlackRock	428.3	-2.5	15.7	27.7	36.1
Catholic Charities Growth & Income Fund	BlackRock	184.3	-0.3	13.1	28.9	35.2
Charities Growth & Income Fund	BlackRock	197.8	-0.6	13.8	28.4	36.8
Charity Multi-Asset Fund	Cazenove	680.7	2	8.8	10.1	61.1
Responsible Charity Multi-Asset Fund	Cazenove	804.1	3.3	8.2	0	74.5
CBF Church of England Investment Fund	CCLA	2142.8	8.2	0	10.8	64.8
COIF Charities Ethical Investment Fund	CCLA	2027.7	8.5	0	9.6	66.8
COIF Charities Investment Fund	CCLA	3672.5	8.4	0	9.2	65.9
Amity Balanced Fund for Charities	EdenTree	25.2	2.6	19	53.8	24.6
M&G Charity Multi-Asset Fund	M&G	202.6	6.5	14.6	41	37.7
Newton Growth & Income Fund for Charities	Newton	807.9	5.8	11.8	40	42.5
Newton SRI Fund for Charities	Newton	120	2.8	10.4	34.7	50.3
Newton Sustainable Growth & Income Fund	Newton	78.8	7.4	9.1	23.7	57.5
Active Income and Growth Fund for Charities	Rathbones	244.8	6.8	15	24.8	37
Core Investment Fund for Charities	Rathbones	156.3	4.8	7.2	33.5	39.3
Charity Assets Trust	Ruffer	167.8	4.3	41.9	17.1	22.5
Sarasin Climate Active Endowments Fund	Sarasin & Partners	515.1	4.4	8.3	18.7	54.3
Sarasin Endowments Fund2	Sarasin & Partners	2384.9	3.8	9.3	20.2	52.5
Sarasin Income & Reserves Fund2	Sarasin & Partners	155.3	3.2	59.9	12.2	12.2
Waverton Charity Growth & Income Fund	Waverton	49.4	4.8	10.8	11.9	53.6

Peer Group Indices						
Sterling Cautious Charity Index	ARC		21.1	46.1	4.8	11
Sterling Balanced Asset Charity Index	ARC		9.2	29.9	19.2	27.4
Sterling Steady Growth Charity Index	ARC		5.2	20.3	31.1	34.6
Sterling Equity Risk Charity Index	ARC		0	13.1	43.6	37

Market Indices ¹	
UK Equities	iShares
International Equities	iShares
UK Sovereign Bonds	iShares
UK Corporate Bond	iShares
UK Property	iShares
Cash	-

INVESTMENT

Source / Asset Risk Consultants

Property %	Other %	Last Quarter	Last 12 Months	YTD 2020	Last 3 Years	Last 5 Years	Last 10 Years
5.2	3.5	3.2	12.4	12.4	34.4	43.9	-
9.2	13.8	4.2	13.1	13.1	45.6	54.2	144.6
9.8	13.3	5	12.8	12.8	40.5	52.7	136.5
5.2	16.4	3.8	11.5	11.5	-	-	-
7	11	3	10.8	10.8	34.7	38.2	110.2
3.8	10.2	3.6	13.9	13.9	43.5	-	-
3.7	12.6	6.5	17.5	17.5	58.6	82.7	225.4
4.6	10.5	6.4	16.8	16.8	56.7	76.6	205.5
3.9	12.6	6.5	17.4	17.4	56.9	78	210.5
0	0	1.4	10.8	10.8	26.2	28.9	95.6
0.2	0	2.1	13.2	13.2	-	-	-
0	0	6	18.6	18.6	43.3	59.6	179.2
0	1.8	4.9	15	15	48.5	58.5	151.8
0	2.4	5.5	15.5	15.5	43.4	56.8	-
6.3	10	2	11.4	11.4	33.3	43.7	-
5.3	9.8	2	14.8	14.8	42.7	49.8	-
0	14.2	1.8	11	11	33	29.4	-
3.6	10.8	6	10.6	10.6	46.8	-	-
4.1	10.2	5.7	10.2	10.2	44.4	53.1	144
0	12.5	2.4	1.4	1.4	19.7	21.9	69.3
6.8	12.1	4.1	11.8	11.8	-	-	-

5.6	11.4	1.8	4.2	4.2	15.4	16.5	46
6.9	7.5	3.4	9.9	9.9	27.8	31.2	86.4
5.5	3.4	3.7	12.3	12.3	34.5	40	113.4
3.7	2.7	4.1	14.8	14.8	38.7	44.5	132.5

4.7	18.3	18.3	22.5	24.9	90.9
7.3	22.8	22.8	70.7	83.6	279.7
2.4	-5.2	-5.2	9.5	11.8	38
0.4	-4.1	-4.1	16.1	17.9	70.5
10.9	28.1	28.1	35.9	31.2	152.6
0	0	0	1	1.9	4.3

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.

The end of an era

What does the current economic climate mean for charities?

WRITTEN BY GRAHAM HARRISON, GROUP MANAGING DIRECTOR, ASSET RISK CONSULTANTS

Lenin is quoted as saying: “There are decades where nothing happens; and there are weeks where decades happen”. That is certainly the way it feels right now. Until recently, the world has been on a multi-decade path of greater integration, both at the geopolitical level and with respect to economic activity and trade. Indeed, since the start of the new millennium, globalisation has gathered momentum and, until Trumpism, Brexit and Covid-19, it was a dominant factor driving financial markets.

As predicted by Adam Smith, pursuit of comparative advantage supported and enhanced the wealth of nations. Whilst there was sometimes vigorous debate around the fair distribution of the benefits of global trade, few doubted that globalisation was a better economic development model than protectionism.

Supply shortages resulting from Covid related lockdowns, followed by the ongoing invasion of Ukraine by Russia, have challenged the idea of globalisation. Indeed history may well record 2022 as the turning point when globalisation was replaced by autarky as the dominant mode of thinking.

Autarky is the idea of self-sufficiency. Originally expounded by Stoic philosophers such as Seneca, it has latterly come to mean the pursuit of economic independence. Russia and its allies are being forced into autarky through western sanctions.

But at the same time the priority of liberal nations has turned towards food and energy security. In time the scope will no doubt expand to include raw materials and intellectual property.

Looking at the votes cast on the UN resolution inviting nations to deplore Russian aggression in Ukraine provides an idea as to how nations might line up should the world fracture into two competing ideological and economic blocks. Although 141 members voted for the resolution, 40 either abstained or voted against, including China and India.

Faced with a change in era, how should charity investors be thinking about investment strategy? Not just what to do today or tomorrow but how to reorientate investment policy to take account of this move from globalisation to autarky.

Tactically, all charity discretionary investment managers and fund managers are currently seeking to protect investor capital as volatile financial markets react to the daily news flow. They are well placed to perform that function and charities should avoid trying to second guess their managers and time exit and re-entry into stocks, sectors and markets.

Strategically, charities should be seeking to open dialogue with their managers and advisers on whether changes in investment policy are necessary or desirable given the prospect of a multi-year reversal of globalisation. Income, total return



and risk assumptions for equity and bond markets both at home and abroad may need to be adjusted to reflect a radically changed geopolitical and economic environment. Investment restrictions, especially those around the ESG principles of “avoid harm” and “benefit society”, may also need updating not just to reflect sanctions but to incorporate a revised world view.

There is no need for charities to rush into making wholesale changes in the midst of the current uncertainty. There is however a need to reassess how a new era, or *Zeitenwende* as it is being described by German Chancellor Olaf Scholz, will change financial risks and rewards for investors.

The bad news is that this new era of autarky is likely to bring with it higher inflation, slower economic growth and, on average, lower real returns from both bond and equity markets. The good news is that a reversal in globalisation should deliver significant investment opportunities for actively managed portfolios for investors nimble enough to identify tomorrow’s winners today. ■



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