

*Round-up:***Funding**

A round-up of charity funding opportunities available now

*Opinion:***Secret CEO**

An anonymous leader on when board meetings turn into PMQs

*Feature:***Trusteeship**

Why do trustees turn to each other before seeking help from regulators?

*Interview:***Adeela Warley**

The CEO of CharityComms on branding, raising voices and leadership in comms

## Generation generous

How can charities seek to attract and retain young donors?



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

**LEADERSHIP VOICES**

"We work hard to make sure leadership is visible when working remotely"

**Plus:**

News, reviews, columns

Sector appointments

See page 52 for charity suppliers' directory

# It's time to plan for the best case scenario.

At Zurich Municipal we believe in a brighter future for our communities. That's why we make it our purpose to help make them more resilient.

For 27 years we've insured charities and voluntary organisations, helping you to better understand and reduce the risks you face. Whether it's guidance from our in-house risk experts to ensure that your vital work is not disrupted, responding to a major incident within 24 hours, or helping with safeguarding assessments, we can work with you to help understand what can go right.

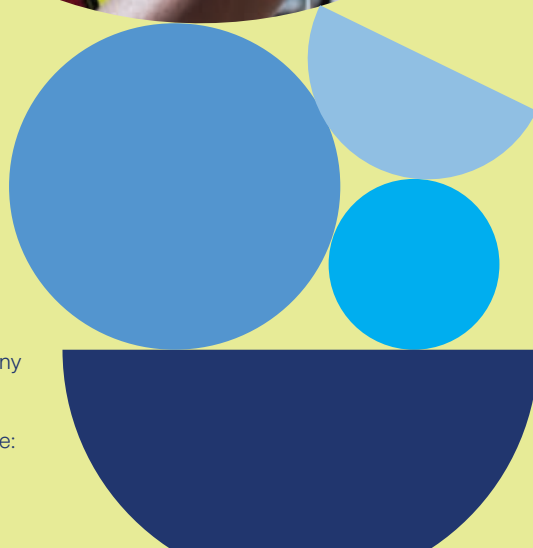
Find out more:

[zurich.co.uk/CTGM](https://zurich.co.uk/CTGM) 0800 232 1901

**Calls may be recorded or monitored to improve our service.**

Zurich Municipal is a trading name of Zurich Insurance plc, a public limited company incorporated in Ireland. Registration No. 13460.

Registered Office: Zurich House, Ballsbridge Park, Dublin 4, Ireland. UK Branch registered in England and Wales Registration No. BR7985. UK Branch Head Office: The Zurich Centre, 3000 Parkway, Whiteley, Fareham, Hampshire PO15 7JZ.



**Editor**

Lauren Weymouth  
lauren.weymouth@charitytimes.com

**Senior writer**

Melissa Moody  
melissa.moody@charitytimes.com

**Reporter**

Joe Lepper  
joelepper@newsandfeatures.co.uk

**Design & Production**

Jessica Harrington  
jessica.harrington@perspectivepublishing.com

**Commercial Manager**

Linda Libetta  
linda.libetta@charitytimes.com  
020 7562 2431

**Charity Times Leadership Network  
Membership Manager**

Shannon Woods  
Shannon.Woods@CharityTimes.com  
0207 562 4385

**Subscription Rates (6 issues pa)**

From £99 for charities and £499  
for corporate companies.  
See **charitytimes.com** for more info.

Printed by Buxton Press

All rights reserved. The views expressed  
are not necessarily those of the publishers.

ISSN : 1355-4573

**Published by**

Perspective Publishing  
6th Floor, 3 London Wall Buildings  
London EC2M 5PD

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

**Managing Director**

John Woods

**Publishing Director**

Mark Evans



## If not now, when?

In March 2019, a series of global climate strikes were started by a 16-year-old activist, Greta Thunberg (now 18). When the strikes began, 1.4 million school children took part globally, skipping school on Fridays to protest against adults' inaction on climate change.

The strikes fuelled a huge movement of youth activism and prompted many young people to start thinking about how they can take control of their futures. Now, the younger population have fires in their bellies and, due to government complacency about some of the biggest threats to their future, are desperate to do something about it.

This has led many young people to start seeking out organisations they can work with to create lasting change. This generation want to give more (see p.20) and they want to engage with charitable organisations that can help them to do it.

This is proving to be an amazing opportunity for charities, who, until now have typically relied on an older audience – both for donations and for volunteering. Thanks to mobile phones, social media and easy access to the internet, younger generations are raising their voices and sharing their wealth and time with charities just like yours.

In this issue, we explore this topic in a bit more detail, seeking to ask: how do we access this generous generation? And, furthermore, how do we hold onto them? Our guide to attracting young philanthropists (p.22) provides some advice on where to begin, while our profile interview with CharityComms CEO, Adeela Warley, provides some useful tips for boosting your brand and remaining relevant.

The pandemic has heightened the desire to make changes, and, as we look to move into a new kind of world, it makes sense to optimise the new opportunities that are available to us. As Michelle Vickers, CEO of the Head and Neck Foundation says in our cover story: "It's too easy to say that young people are our future but that's because they are. Broaden your tools, find out who you're not reaching and think of specific ways to make contact with them." After all, if you don't reach this key audience now, when will you?



Lauren Weymouth, Editor

**charitytimes**





## September 2021



06

### News & views

#### Regulars

06 News

12 Appointments

#### Columns

14 Diversity

*by Srabani Sen*

15 Leadership

*by Caron Bradshaw*

#### Secret CEO

16 Board meetings

*by anonymous*

#### Charity Services

52 Suppliers Directory



20

### On the cover

20 Generation generous

Generation Z are now among the most giving demographic. But how can charities attract and retain them?



17

### Interview

17 Adeela Warley

The CEO of CharityComms on branding, amplifying voices and how comms teams can lead the way





28

## Guides

### 22 Young philanthropists

How to find, attract and engage with young philanthropists

### 34 Virtual events

Top 10 virtual event platforms for hybrid fundraising solutions

### 38 Mental health

How to maintain good employee mental health post-pandemic



32

## Features

### 28 Trusteeship

Why do charity trustees avoid seeking help from regulators?

### 32 Retail

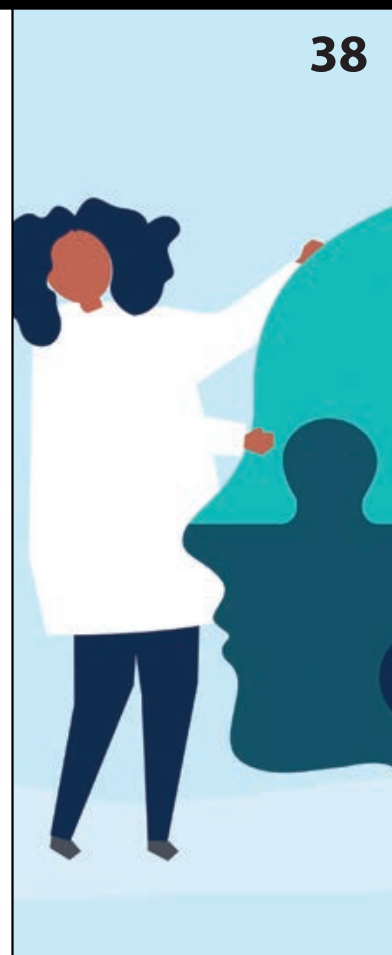
What does the future look like for charity shops?

### 40 Digital futures

How could a digital transformation benefit your charity?

### 46 Sin stocks

What exactly are 'sin stocks' and how should charities handle them?



38

## Focus

### 24 EDI

A look at the charities addressing their historical links to slavery

### 36 CEO Q&A

Dogs Trust CEO, Owen Sharp on surviving the pandemic

### 44 Funding

A round-up of funding opportunities available now

## in brief

### SAMARITANS VOLUNTEERS MET VULNERABLE CALLERS FOR SEX

Samaritans has introduced new safeguarding measures after reports that volunteers met vulnerable callers for sex. The measures will include call monitoring to prevent inappropriate relationships. According to The Telegraph, there were 44 serious incidents since 2017, often middle-aged men using their position to meet up with female callers for sex.

### BARNARDO'S CEO STEPS DOWN FOR FAMILY REASONS

Barnardo's chief executive Javed Khan is stepping down from the role after seven years leading the children's charity. Khan said that the decision is "what is best for me and my family" in a statement on the charity's website. He is leaving the role immediately although will continue to support the charity's board until the end of December.

### CHARITIES URGED TO 'MAINTAIN A CAUTIOUS APPROACH' TO FUNDRAISING

The Fundraising Regulator and Chartered Institute of Fundraising (CIOF) have released fresh guidance around public fundraising following the lifting of Covid-19 restrictions. The so-called 'Freedom Day' changes have removed requirements around mask wearing and social distancing. But despite the changes the fresh guidance urge charities to maintain caution.

### TRUSTEE WHO USED MULTIPLE ALIASES ACROSS SEVEN CHARITIES RECEIVES MAXIMUM BAN

A trustee has been banned for the maximum 15 years from holding senior voluntary sector roles after it emerged he was involved under aliases in the running of seven charities, most of which had "no evidence of charitable activity".

*"Around 31% of staff say they are burned out by intense remote working and 38% of charities say they have found remote working 'challenging'"*

The Charity Commission action has been taken against Opas Tamba Jimmy-Kay, who used a number of aliases across the seven charities.

### EMAIL MARKETING BOOM RECORDED FOR CHARITIES AMID PANDEMIC

The public's engagement with email marketing from charities increased markedly during 2020, according to latest data. Information provided by nine email marketing service providers, including dotdigital and Pure360 and covering more than 158 billion emails, was used for the research. This found that the proportion of people clicking on links in charity emails almost doubled between 2020 and 2019 from 3.9% to 6.8%.



### PUBLIC TRUST IN CHARITIES AT HIGHEST LEVEL SINCE 2014

Trust among the public in charities is at its highest level since 2014, according to latest figures published by the Charity Commission. This is the second year running that trust levels have improved, following a slump in public trust between 2016 and 2018 when the voluntary sector was hit by a number of high-profile fundraising and safeguarding scandals. The independent research has been carried out by Yonder, which has given a mean average score out of ten for public trust in charities based on the results of an online survey.

### ONE IN FIVE CHARITIES SAY LACK OF MONEY IS A BARRIER TO BEING MORE INCLUSIVE

A fifth of charities are claiming they are unable to enact improvements to equality, diversity and inclusion (EDI) in their organisation due to lack of financial resources, according to a survey. The latest data from the Covid-19 Voluntary Sector Impact Barometer found that 20% of charities said the most reported barrier is limited financial resources. Lack of staff (15%), HR skills and knowledge (12%) and diversity and inclusion knowledge (11%), are among other barriers.

### INTERNATIONAL AID CHARITY CONSIDERS LEGAL CHALLENGE TO GOVERNMENT'S FUNDING CUTS

The International Planned Parenthood Federation (IPPF) is considering legal action against the UK government against its decision to cut government spending on international aid. The move follows MPs voted to reduce the government's aid contribution from 0.7% to 0.5% of gross national income (GNI), amounting to £4.5bn. Cuts have included the loss of Foreign, Commonwealth and Development

Office (FCDO) funding to IPPF for its ACCESS grant, to support communities in Lebanon, Mozambique, Nepal and Uganda.

#### TRUSTEES RELY ON EACH OTHER FOR HELP AND RARELY ACCESS REGULATOR SUPPORT, SURVEY FINDS

Trustees are relying on fellow trustees and colleagues for help but are rarely seeking support from the Charity Commission, other charities directly or advisory bodies, a survey has found. It found that almost half (46%) look to colleagues or another trustee for help 'several times a year'. Meanwhile, just one in ten trustees turn to the Charity Commission, another charity or an advisory body for support as regularly.

#### HALF OF CHARITY WORKERS EXPECT RETURN TO OFFICE TO BE FLEXIBLE OR PART TIME

Half of charity workers are expecting to be able to return to the office under flexible arrangements or for three days or less a week when lockdown restrictions ease. The figures were revealed in the latest donor research report from Enthuse, who asked charity workers currently remote working were asked what arrangements they were expecting when they return to the office. Of those surveyed 17% said they expected to be allowed to return under flexible arrangements.

#### DOMESTIC VIOLENCE CHARITY DENIES 'SYSTEMIC RACISM' ALLEGATIONS

Solace Women's Aid has refuted allegations of racism within its organisation that have surfaced on social media and reported in the national media. The allegations have emerged via a Twitter group called VAWGracism, which claims to be dedicated to "highlighting racism" in



the violence against women and girls (VAWG) sector. Their open letter claims that "until recently" it believed that Solace supported diversity and championing the rights of black people.

#### ICO FINES CHARITY £25,000 FOR FAILING TO KEEP HUNDREDS OF USERS' DATA SAFE

Transgender charity Mermaids has been fined £25,000 by the Information Commissioner's Office (ICO) for failing to protect the personal data of its users. The ICO became aware of the breach two years ago relating to an internal email group set up by the charity and used between 2016 and 2017. This group "was created with insufficiently secure settings" leading to around 780 pages of confidential emails viewable online for nearly three years.

#### GOVERNMENT URGED TO 'CLOSE A SIGNIFICANT GAP' IN UNDERSTANDING OF CHARITIES' VALUE TO UK ECONOMY

The government is lagging behind dozens of countries in its understanding of the value and size of the UK's charity sector, economists are warning. Currently data on charities is spread across a range of different sectors and industries, making it impossible to

"separately identify the true size of the social sector", according to Pro Bono Economics. It is proposing the UK adopt a similar method as 28 countries, including the US, France, Japan and Brazil and create a "social economy satellite" set of data.

#### CHARITIES' ONLINE REVENUE UP A DURING PANDEMIC, RESEARCH FINDS

Online revenue of UK charities increased by 35% during the Covid-19 pandemic, latest research into the sector's finances have shown. The M+R Benchmarks Study looked at data over 2019 and 2020 in the UK and US. This found that online growth in the UK is faster than in the US, which saw a 30% increase.

#### REMOTE WORKING LEAVING AROUND A THIRD OF CHARITY WORKERS 'BURNED OUT'

Just under a third of charity staff are "burned out from the demands of intense remote working" amid the Covid-19 pandemic, a report has warned. The Charity Digital Skills Report 2021 has looked at the state of digital skills and expertise among charities over the last, pandemic hit, year. But the report found that 31% of staff say they are burned out by intense remote working and 38% of charities say they have found remote working "challenging".



A fifth of charities are claiming they are unable to enact improvements to equality, diversity and inclusion (EDI) in their organisation due to lack of financial resources, according to a new survey.

The latest data from the Covid-19 Voluntary Sector Impact Barometer found that the most reported barrier to being more inclusive and addressing EDI issues is limited financial resources, cited by 20% of charities.

Meanwhile lack of staff (15%), HR skills and knowledge (12%) and diversity and inclusion knowledge (11%), are among other barriers.

Despite charities citing barriers to improving equality in their organisation, the survey found that the majority (79%) have drawn up plans to improve EDI.

In addition, more than half (59%) have changed their approach to EDI since March 2020.

The most reported changes by organisations in procedures or policies to promote greater equality, inclusion and diversity since March 2020 have been staff training (16%), safeguarding (12%) and staff recruitment (13%).

The survey also found that just under a fifth (17%) of charities have seen greater diversity among service users since the Covid-19 pandemic.

Meanwhile, only 15% are reporting an increase in diversity of their volunteers.

### **Less than one in ten charities increase workforce diversity amid Covid**

Less than one in ten (9%) reported an increase in diversity of their workforce during the Covid-19 crisis, the survey also found.

The survey also found that “some smaller organisations have been unable to respond to EDI issues due to their own growing needs, changing priorities and the struggle to cope with the challenges of Covid-19”.

One respondent said: “The dynamics of Covid have put a lot of pressure on people, both emotionally and practically.

“Trying to improve on EDI

## **One in five charities say lack of money is a barrier to being more inclusive**

LIMITED FINANCIAL RESOURCES ARE BARRIER TO 20% OF CHARITIES, RESEARCH FINDS

WRITTEN BY JOE LEPPER

(specifically anti-racism) while all of the Covid issues were also going on has been challenging, but necessary.”

The Barometer is led by the NCVO and Nottingham Trent and Sheffield Hallam universities.

“As lockdown eases, it’s clear that the road to recovery will not be linear for many voluntary and charity organisations, and this has had an impact on the sector’s vital plans for EDI work,” said NCVO research and insight manager Anya Martin.

“The report shows that smaller organisations in particular face challenges with limited funding and resources. However, some organisations have been able to revise their EDI plans during the pandemic.

“Despite the limitations of the funding and financial support available to charities throughout the pandemic, demand for services has remained at an upward trajectory.

“The rise in volunteers at the beginning of the pandemic also saw an increase in the diversity of volunteers working with some organisations.

“As we look to the future it is really important that charities are confident they are continuing to focus on EDI and adopting best practice both within their organisations, and in the services they deliver, to better reflect and support the communities and individuals they serve.”

Nottingham Trent University organisational behaviour professor Daniel King added: “Many interviewees said that Covid-19 gave opportunities reflect and challenge their assumptions, meaning they begun having difficult conversations within their organisations about some of the changes they need to make.

“However, many interviewees recognise there is a long way to go, there are structural and systematic forms of exclusion, from the way organisations are run through to funding.”

### **People working in international aid witness or experience racism**

The latest research comes shortly after the publication of a survey by international NGO network, Bond, which found that 68% of people of colour working in the international sector have experienced or witnessed racism in the last year.



“Many of these examples were incidents of overt racism, causing considerable psychological harm and mental health challenges for those affected,” said Bond.

“In some cases, employees were made to continue working in environments in which they felt unsafe.”

Those surveyed are pessimistic their organisation is able to tackle racism. Just under nine out of ten (89%) believe their organisation is not committed to diversity and inclusion.

Among those surveyed two thirds (65%) say they have not had equal access to mentors as their white peers.

One of those surveyed said: “In terms of support and supervision, I felt that my manager was unsure how to relate to me compared to my white colleagues in a similar position, therefore I felt I had slightly less supervision/support.”

Another said: “[I’ve had] a mix of microaggressions, bullying and outright racism and xenophobia [from my managers] over the years. One manager had a whole “white saviour” complex that was patronising to me and didn’t help my progression as she thought it would be too much for me.”

The views of 150 people of colour were involved in the survey, which forms part of Bond’s report *Racism, power and truth: experiences of people of colour in development*.

The report says organisational cultures in international aid are “deeply reported in racism”.

It adds: “Racism is not only reproduced within systems, policies and structures, but is also embedded in our organisational cultures.

“Our informal, often unquestioned ways of working create expectations of how people of colour should work and behave, behaviours that are considered acceptable to treat

people of colour, and unwritten rules about people of colour.

“These expectations are often fundamentally gendered and racialised, and exclude people of colour through the implication they are not good enough, that they don’t belong; essentially their ‘othering’.”

### **Recommendations**

Bond calls on charity leaders to ensure half their boards and senior positions are made up of people of colour by 2025. Annual reports need to report progress in diversity, the report adds.

International aid organisations need to review decisions to allocate roles in low to middle income country offices to staff from rich countries.

It also urges charity leaders not to “shy away from publicly discussing how racism and anti-Blackness manifests in your organisation, taking into account the ways in which racism intersects with other forms of oppression, such as sexism”.

In addition, boards and leaders need to consider anti-racism as a responsibility of leadership, with the chief executive held accountable for performance on race equality.

In addition, charity CEOs and boards should “commit to sponsoring people of colour”. This “means investing time with them, opening doors for them and connection to your network. It also means championing them publicly and putting them forward for opportunities”.

The report warns international aid organisations against tackling diversity, gender and other social division “in silos”, which can lead to groups of people falling “through the cracks”.

In May, international peace charity Peace Direct released a report warning that structural racism is “deeply embedded in the everyday culture and working practices” of the aid sector.

It also said that NGOs and their supporters in the Northern Hemisphere are reluctant to accept the modern aid sector’s links to colonialism. ■

# Volunteering

The nature of volunteering has shifted markedly amid the Covid-19 pandemic, with formal arrangements dropping to an all-time low, while informal support for communities has risen to an all-time high.

The figures have been revealed in the government's annual Community Life Survey, which includes the views of more than 10,000 adults across England during different times between April 2020 and March this year.

This found that while the number of people formally volunteering at least once a month has dropped to an all time low of 17%, there was an increase in the proportion of those volunteering informally to support their community.

The survey revealed an all-time high of 33% of respondents who had volunteered informally at least once a month, through community support such as shopping for a neighbour or looking after a friend's children.

The survey also found that 95% of people felt they had people there for them to help, which matched the results of last year's survey.

The most common barriers for people to take part in formal volunteering were work commitments, cited by 48% of respondents, and 'I do other things in my spare time', cited by 31%.

Key factors in taking part in formal volunteering are wanting to help people, mentioned by 50%, and supporting a cause that is important to them (33%).

"The past 18 months have been extraordinarily difficult for everyone, and have impacted our lives in so many ways," said civil society minister Baroness Barran.

"I'm delighted to see the highest percentage on record of people informally volunteering, and throughout the pandemic, formal and informal volunteers have been there for those who needed help.

"I recommend everyone considers volunteering in some way whether big or small, not only to help their community, but also to experience the huge benefits

## Govt survey reveals major shift in volunteering behaviour

THE COMMUNITY LIFE SURVEY ALSO REVEALS THAT THE NUMBER OF PEOPLE DONATING TO CHARITIES HAS SLUMPED

WRITTEN BY JOE LEPPER



of forming new relationships and improving mental wellbeing.

"We've stayed connected, helped out, and been there for each other. I absolutely feel that whilst it's been a difficult time, we will emerge from the pandemic with a stronger, more connected society than ever before."

### Decrease in charitable giving

The survey also found that the number of people donating to charity has slumped amid the pandemic. It found that over the previous four weeks when responding to the survey, just 63% had given to charitable causes.

This is significantly lower than in 2019/20, when the proportion was 75%, and is the lowest rate of giving since the survey began in 2013/14.

The survey found that women were more likely than men to have given to charity over the last four weeks (67% compared to 59%).

Meanwhile, the lowest proportion of charitable giving by age was from 16-24-year-olds. Half of this age group gave to charity, compared to 70% of 65-74 year olds.

However, the survey notes that all age groups other than 16-24-year-olds saw a fall in charitable giving.

It also emerged that those living in the least deprived areas were more likely to have given to charity (67%) compared to those in the most deprived areas (60%). ■





# Charity Governance Summit



Join an exciting programme full of forward-thinking conversations, access the latest information, and jump at the opportunity to attend additional afternoon workshops on both days.

Here's a taste of what's on the agenda:

- how to implement s.172 stakeholders' engagement into the board agenda
- the role of governance in delivering the values and culture across the organisation
- the evolving regulatory landscape, including the coming new SORP and the Charity Governance code principles
- understanding the challenges and solutions to nurture a diverse board
- responsibilities of trustees in times of financial stress

15-16 September mornings



Book your place at [cgi.org.uk/charity-summit](https://cgi.org.uk/charity-summit)

## People on the move...

The latest appointments from around the charity sector

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



### AMANDA JORDAN

**Virgin Money Foundation** has appointed Amanda Jordan OBE as its new chair. Amanda has a wealth of experience in the public, as well as the third sector and in 2000 she set up Corporate Citizenship, a leading international sustainability management consultancy. She replaces Edward Wakefield who has been chair since 2015.



### ANNAMARIE HASSALL

Education charity, **nasen**, has appointed Annamarie Hassall MBE, Strategic Director of the National Children's Bureau, as its new CEO. She brings with her experience in children's services, working closely with ministers, DfE, DWP, Public Health England and wider stakeholders. She will take over from departing CEO, Professor Adam Boddison.



### JONATHAN FREEMAN

**Carers Worldwide**, the international development charity promoting recognition and support of family carers in low and middle income countries, has appointed Jonathan Freeman MBE as its new chair of trustees. He succeeds founding chair Chris Underhill MBE who has stepped down after having been with the charity since its inception in 2012.



### KATIE DOCHERTY

The **Chartered Institute of Fundraising** has appointed a new chief executive following the departure of Peter Lewis. Katie Docherty will take to the helm in October, following a transition period with interim CEO Dhiyva O'Connor. Docherty will join the organisation from Fife, in Scotland, making her the first Scottish-based leader for the CloF.



### NAOMI HURST

Data systems and analysis specialists in the charity and non-profit sector, **Wood for Trees** has announced the appointment of data Scientist, Quentin Sorel, and marketing manager, Naomi Hurst (pictured). Hurst is currently an associate member of the Chartered Institute of Marketing and Sorel was a business intelligence consultant for a French luxury fashion brand.

# Appointments



## CAROLE EASTON

Dr Carole Easton has been appointed as the permanent CEO at **Centre for Ageing Better** for the next year. Easton was originally appointed interim chief executive after Dr Anna Dixon left Ageing Better in June. She has had an extensive career in the voluntary sector, with leadership roles at Refuge, the British Lung Foundation and the Young Women's Trust.



## DUNCAN LEWIS

Homelessness charity **Emmaus Hertfordshire** has appointed Duncan Lewis as its new chief executive. After starting his career in travel, financial services and commercial property, Lewis moved into the not-for-profit sector working for organisations including Commonwealth Games England, Age UK and the Lord's Taverners.



## JAVED KHAN

**Barnardo's** chief executive Javed Khan is stepping down from the role after seven years leading the children's charity. He is leaving the role immediately although will continue to support the charity's board until the end of December. Lynne Perry, the charity's corporate director of children's services operations, has been appointed as acting chief executive.



## SARAH BARBER

The **St Vincent de Paul Society (SVP)** has appointed Sarah Barber as its director of youth services. Following her tenure as director of the Brentwood Catholic Youth Service, Barber joined CAFOD as youth leadership coordinator during which time she developed the sixth form CAFOD Young Leadership Programme, which now runs in nine dioceses.



## SIMON BLAKE

**Hospice UK** has appointed Simon Blake OBE as the chair of its Dying Matters campaign. Blake is the CEO of Mental Health First Aid England (MHFA) and has dedicated his career to championing an array of social issues including sexual and reproductive rights, LGBTQ+ rights and Health Education (PSHE) and Citizenship.



## WANDA WYPORSKA

Dr Wanda Wyporska is to join the **Society of Genealogists** as its new CEO after leading The Equality Trust for the last five years. She will replace interim CEO Laura Doyle, who has been in post since December 2020. Dr Wyporska is also an historian of the early modern period and regularly contributes to historical events, podcasts and interviews.



## Diversity

### WHEN IT COMES TO DISMANTLING ATTITUDES THAT HAVE BEEN HOLDING US BACK, ISN'T PATIENCE WORTH A TRY?



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

**T**wo sets of news stories are colliding in my brain at the moment. In the few days before I sat down to write this column, there has been media coverage of Michael Gove branding those refusing the take the Covid-19 vaccine “selfish”. There has also been coverage of the abuse RNLI volunteers have faced from members of the public (and Nigel Farage) for their work in rescuing refugees from danger as they try to reach our shores.

What struck me about both these stories is not the ‘rent a quote’ people that the media seem to trot out these days. People with no knowledge or expertise but with ‘opinions’. No. What struck me was the response of the people quietly getting on with the job in hand. Doctors and medical professionals who point out that labelling or criticising anti-vaxxers will not persuade them to change their minds, but explaining things and exploring their fears might. RNLI colleagues calmly pointing out that, in the words of RNLI CEO Mark Dowie: “We do not judge those we rescue – where we believe there is a risk to life at sea, we will always launch.”

It put me in mind of deep canvassing, a technique originally developed to address homophobia in the US. When I first heard about deep canvassing, it practically blew my mind. Deep canvassing is a technique developed by the LGBT community in Los Angeles to try and literally talk people away from their bigotry. It was developed in 2012 in response to those who voted against gay marriage.

Deep canvassers go door-to-door and open up conversations with people with anti-gay views. These conversations are rooted in empathy, rather than trying to persuade others they are wrong. Deep canvassing focuses on listening and trying to establish a human connection with people with prejudiced views and create a connection on things the canvassers may have in common with those they are speaking with.

Deep canvassing is the antithesis of telling people they are wrong. It is about being curious

and respectful towards those who think differently. It is about hearing their personal stories, then trying to connect the canvassers’ lived experiences with those personal stories. It involves extraordinary levels of courage, vulnerability, patience and humility on the part of the canvasser.

Deep canvassing works on the principle that if people can persuade themselves to change their own minds, the results will be more powerful and will stick. The canvasser’s job is not to persuade, but to open up conversations. To be clear, this is not about condoning prejudice, but about creating the conditions to enable those with prejudiced views to begin to think differently.

And guess what? There is the beginning of a body of evidence that deep canvassing works. A study published in *Science* in 2016 and a follow up peer-reviewed study which included “placebo controlled field experiments” published in the *American Political Science Review* in 2020 showed that deep canvassing can reduce prejudice.

One of the keys to deep canvassing, according to these studies, is patience. Patience in the face of people expressing bigoted views. The patience to recognise the humanity of these people. The patience to play the long game that creates deep change.

In the face of bigotry, even in the face of people who just hold different views from us, it can feel good to shout others down. What deep canvassing shows us is that there is another way to dismantle prejudice. A way that breaks down walls rather than builds them higher.

When it comes to dismantling attitudes that have been holding us back for generations, isn't patience worth a try? ■

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](mailto:editor@charitytimes.com)

## Mental health

**“EVERYTHING WILL BE ALL RIGHT IN THE END...”**

Whenever I sit down to write this piece for *Charity Times*, I always search for something that may add value to those reading it, be it technical, topical or provocative. But this month, I feel I should lean into my vulnerability and share some reflections which I hope will resonate with readers.

I’m an experienced CEO. I’ve tackled crisis and change, high pressure and disappointment. I’ve had my fair share of failure and learned plenty from the school of hard knocks. I’ve shared my highs and lows openly in the past in the hope that doing so will help others recognise the importance of looking after their mental health and that of their colleagues.

This acceptance that it’s okay to not be okay has been reasonably comfortable for me and I have felt safe to be vulnerable with those around me when things are not going as I would hope. It has served me well and preserved my sanity. It has given me the resilience to weather the tough times and the wisdom to celebrate when things are performing well.

But is it just me or have you also recently noticed how much more effort is needed to remain level and positive? I love my work, my family are great, I’m getting to spend a lot of time outdoors, CFG’s team are working hard and showing some really positive results.

There is no one specific thing that is creating extra weight. I’ve even got a holiday booked to visit my in-laws in the South of France, which I hope will go ahead – with precautions – despite the continuing pandemic.

Are you feeling the same? Is life testing you just a bit more in recent weeks?

In speaking to CFG members and peers across the sector I believe I am not alone. There is an incredible sense of fatigue and burn out in many organisations – one that we must not take our eye off if we are to face adversity in the near future.

I confess that in the height of the pandemic, I

could almost say I had a spring in my step. Not because I enjoyed the conditions in which CFG or the sector was operating (in fact, the plight of many was heartbreaking in the extreme).

But the adrenalin of a fast-changing situation requiring solutions and creative thinking, coupled with the reward of working collaboratively, listening to the inspirational actions of colleagues across the sector and witnessing the sheer hard work and support of the people around me (staff, members and partners), kept my personal reserves well topped up, notwithstanding the harsh realities and trauma of the Covid-19 global pandemic.

As the months have passed, I have needed more effort to remain positive in my outlook. I’ve had to take more time to reflect and rebalance. I’ve had to be more present for my colleagues and disciplined in carving out time to recharge my batteries.

As a sector, we’ve spent the past 18 months running flat out. We’ve had to change at pace, experience failure and make tough choices, responding to higher demands with constrained resources. It’s unsurprising that it has taken its toll.

So, if you are like me and finding it a bit tricky – to say the least – I want to say you are not alone. Give yourself a break, take time to refresh, reach out to friends and peers or lean on professional networks like CFG to connect with others working in your space.

We will get through this! As I like to say to my kids (blame the film, *The Best Exotic Marigold Hotel*)

Everything will be all right in the end... and if it’s not all right then, trust me, it’s not yet the end. ■

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**

# Secret charity CEO: 'A board meeting feels like PMQs'

As part of a new series, a secret charity CEO documents some of their niggling issues relating to charity leadership. This month, issues with a difficult chair lead to some unwanted tension. **WRITTEN BY AN ANONYMOUS CEO**

**A**t a recent board meeting, after presenting my regular CEO report which, on this occasion, was full of positive news and exciting developments, the chair asked his usual: "Any questions or comments from the trustees?"

I've been to hundreds of board meetings in my time as either a trustee or a CEO. This question usually elicits silence from some trustees (not necessarily a good thing), a couple of helpful suggestions from others and some general praise and thanks from a few more.

Not this time. The first trustee to raise their hand - in this case the small yellow virtual Teams hand that pops up in the corner - had seven questions. Yes, seven.

At this point, I should make it clear that I think constructive scrutiny and informed oversight is crucial to the effective running of a charity. This is a board's primary objective. 'Constructive' and 'informed' being the operative words. Not grandstanding.

One of the seven questions was what he clearly thought and hoped was what they call in politics a 'gotcha moment'. Unfortunately for him, he'd completely misunderstood something fundamental about our



organisation and the thing he thought we were doing terribly wrong was actually something we usually do and something we take pride in.

Mustering all the magnanimity I could, channelling Michelle Obama's 'when they go low, you go high' mantra and resisting the urge to indulge in petty one-upmanship, I smiled and explained as politely as possible that he'd actually misunderstood.

I didn't add what was on the tip of my tongue: that what he had misunderstood was pretty central to our values as an organisation and set us apart from others in our sector. Something he should absolutely be fully aware of.

There was a momentary flash of frustration in his eyes and then he shrunk ever so slightly in his seat. The manner in which he delivered his remaining three questions was a

little less 'Leader of the Opposition trying to score points' and little more 'backbench MP eager to use the occasion to champion a local cause'. Sometimes in this role we have to celebrate the small victories.

Readers will by now be wondering how we got to this point. This particular trustee has never quite moved on from when I respectfully challenged both the manner in which a board decision was reached and the decision itself. It was a poor decision taken without due consideration or process and it was my absolute duty to challenge it.

Penny Wilson, CEO of the wonderful charity Getting On Board, often writes compellingly in these pages about trustees. In a recent article she pointed out that "trustees should listen, be open to challenge and be able to change their minds". Chance would be a fine thing. Instead, an opportunity to contradict me never seems to be missed, which has made board meetings an increasingly joyless experience.

*If you can relate to the issues mentioned in this article, or if you would like to anonymously document some of your own challenges, get in touch at [editor@charitytimes.com](mailto:editor@charitytimes.com). All names will remain anonymous throughout. ■*



**Profile: Adeela Warley**

## Leading the charge

**ADEELA WARLEY, CEO OF CHARITYCOMMS, TALKS TO DAVID ADAMS ABOUT BRANDING, AMPLIFYING VOICES AND HOW CHARITY COMMS TEAMS CAN LEAD THE WAY**

**H**as there ever have been a more important time to be working on charities' communications strategies than now, in the digital era, during the Covid crisis? And if there is still anyone out there who doubts the commitment of communications professionals to the sector, then the life and work of Adeela Warley, CEO of the CharityComms network, should stand as a correction to that misconception.

Indeed, her career to date has been driven by her commitment to causes. It was also influenced, early on, by the example of her late parents. They emigrated from South Africa to the UK, where Warley was born, then moved to Uganda, where she spent her earliest years; then back to the UK, this time settling in south-east London.

Both worked for the NHS and were active in the anti-Apartheid movement. "My mother became a nurse, my father was the first doctor who qualified in his Malay community: they spent their lives in the service of health; and they were inspirational," says Warley. "They were very supportive in wanting to help us achieve something worthwhile. I think that's what's guided me through my career – asking myself, do I care about this job; and can I make a difference?"

Warley took a degree in English and American literature at the University of Sussex in the early 1980s, then returned to London unsure of what to do next. She took a job working at Downham Library in Lewisham, which turned out to be another source of inspiration, working with a boss, Maureen Keane, who wanted to reinvent a rather staid



library service. Warley ran children's storytelling, theatre and other events, helping to turn the library into a genuine community hub. "That was my stepping stone to the not-for-profit sector," she says.

### **Moving into comms**

Her next steps followed her passions and Warley began to develop her communications expertise. She worked first for the anti-vivisection charity BUAV (now Cruelty Free International), on high-profile campaigns, including the Choose Cruelty Free campaign run with the Body Shop; before moving to a job that allowed her to contribute directly to a cause even closer to her heart, at Friends of the Earth.

"When I was at university I joined Greenpeace as a volunteer, concerned about threats to the natural world, so going to Friends of the Earth was an absolute dream job." She



worked there from 1989 until 2016, eventually becoming head of communications and working on campaigns including the Big Ask, which helped convince the UK government to make a legally-binding commitment to reduce carbon emissions.

In 2015, Warley also became a trustee for CharityComms. Friends of the Earth had been an early member of the network, created in 2007 by charity communications professionals seeking to share best practice and innovation. Trusteeship gave her new insights into charity governance and an opportunity to give something back to the sector. Then in 2017, she was offered the post of CEO.

### Scaling up

Her priorities to date have been based around investing in the skills and scale of the CharityComms' team (the organisation now has

13 employees) and the organisation's capacity and capabilities, including a more dynamic online operation; and asking the members what they need from the network. There are now more than 8,000 individual members, working for over 700 charities of every shape and size.

Warley believes CharityComms deserves some credit for helping to bring about some positive change. "One of our ambitions is to improve the understanding and support that comms teams get from the centre and senior leadership teams and trustees – and on that I do think that things have moved in the right direction," she says. She is also pleased to see a shift to put charities' "audiences" at the heart of what they do, in response to the fact that in a digital world there are now more ways in which charities can "empower supporters and beneficiaries to lead".

She is hugely proud of the way that CharityComms members and organisations across the sector have responded to the events of 2020 and 2021. Individual organisations she picks out include NHS Charities Together (“a phenomenal story of success”) and Blood Cancer UK, which decided to continue with a full relaunch of their brand in March 2020. “They realised their old brand was not helping people to engage with them or their services, so despite everything they pushed ahead [to build] ... a clear and compelling brand that the people they serve, people who are in at-risk groups, could find quickly.”

### Leading the way

She also highlights the role that communications has played in helping charities to address the issues brought to the surface by the death of George Floyd and the Black Lives Matter movement – including charities in the UK seeking to improve their own performance on diversity and inclusion.

“Our lens on this is: what’s the role of communicators in transforming brands, to really make them anti-racist and inclusive? Comms people are best placed to lead the charge, because we’re used to dealing with multiple stakeholders, we’re used to testing and trialling new approaches; and we lead in the language that charities use, and framing the stories we tell. [We can] ... reflect on whether we’ve done that well, or whether actually, the language that we’ve adopted is not inclusive.”

Where things have gone wrong within the sector, Warley says there has been a shift from “very defensive PR that always tries to put the best face forward”, to “a more authentic type of communication, which is prepared to say: ‘yes, things have not gone as they should have done, we are going to change and here’s how’.” She sees this as being part of a broader process in which communications professionals have had to counter negative publicity related to fundraising, governance and misconduct scandals during recent years. She believes that good communications strategies, focused on audiences, can play a key role in helping the sector to tap into a clear appetite for doing good

within society that has been visible throughout the pandemic.

“Yes, there’s a lot of anger and frustration that lots of things are wrong with society, but harnessing that desire to change the world is what charities do best, and I think there’s a whole new generation who want to tackle the greatest social problems,” she says. “Finding ways of communicating with them is going to be such an important part of comms and engagement strategies going forward.”

Warley’s own contributions to the sector were recognised in the 2021 New Year’s Honours list, with the award of an OBE for services to charity communications. “It all still seems a bit unreal,” she says. She felt some “personal anguish” about accepting the award and is among the supporters of the Excellence not Empire campaign – see [www.excellencenotempire.co.uk/supporters](http://www.excellencenotempire.co.uk/supporters).

“I accepted the award because it felt like a wonderful recognition of the role communications play in driving social good,” she says.

Outside work, she lives in Catford, south-east London, with her partner Paul – who works for Friends of the Earth (they met when they were both volunteering for Greenpace in the 1980s) – and a ginger and white cat, Roli. She and Paul devote as much time as possible to gardening: “We have a wild, exotic garden, with palm trees and Chilean bellflowers, things like that; and Paul grows lots of vegetables in the garden.”

Hearing her talk about the garden makes you want to pop round to admire their handiwork. You suspect it has been created with the same care, passion and patience that has helped Warley to achieve so much during her career to date – although she is self-deprecating about the course it has taken. “My journey has been opportunistic: through encouragement from others I’ve had opportunities come my way and I’ve been able to take them,” she says. But she is now helping to encourage other communications professionals across the sector to make the most of the opportunities they encounter – and by doing so to make vital contributions towards the causes to which they and their colleagues are dedicated. ■



# Generation generous

**Gen-Z are creeping up to be among the most generous donors, so how do charities seek attract and retain them?** **WRITTEN BY LAUREN WEYMOUTH**

Over the past two years, donors' attitudes towards charity have changed considerably. Amid a global pandemic, climate change, a refugee crisis and tensions in Afghanistan, a whole new demographic of people have started to think about how they might be able to give more. One demographic in particular, 'Gen Z', are passionate about doing more for the world and, through social media, are seeking charities that share similar values.

Recent research has backed up this trend. This year's annual *Donor Pulse* report from Enthuse, found that as well as being far more likely to give, under 40s spread their giving amongst more different causes than over 40s. Nearly half (48%) have donated to three or more causes in the last three months, "underlining the importance of charities building campaigns and approaches that are designed to appeal to younger donors".

The shift to online giving has also accelerated in recent years, which has been a factor in the huge increase in donations from younger donors. The report found 44% of the public have given online – up 7% since June 2020. Under 40s were naturally the main drivers of this increase with 62% of Gen Z and 64% of millennials donating online.

These figures come despite lockdown restrictions lifting, highlighting a demand for online giving, even in a face-to-face world.



This is positive news for charities, who are now able to access a younger audience more easily than prior to the pandemic.

"Charities need to be innovating to appeal to younger supporters if they are to maximise their potential donations," Louise Tullin, CMO at Enthuse says. "Younger donors are some of the most generous, which means charities would be missing out on considerable potential income if they failed to accommodate for this tech-savvy generation with digital fundraising options".

## Branding is key

Branding is key to reaching this audience – Tullin notes that 78% of donors can remember the name of the charity they last gave to when donating through a charity's website, but only 63% can recall the charity if they went through a consumer giving platform.

"If charities innovate with

branded, digital fundraising solutions, not only will they be accommodating younger donors' preferred way to give, but they'll increase their chances of building the next generation of long-term supporters through improved brand recall," Tullin says.

Wander Bruijtel, branding expert at branding agency Born Ugly agrees, arguing that it's essential charities understand their target audience and what behaviour or action they would like their audience to take. "In the case of a charity, this may be to donate money, to volunteer time, to create word of mouth," he says.

"Once you're clear on these points, it's about understanding how you can create an emotional connection for the brand in the minds of the target audience. Partly, this is about answering rational questions such as 'what is your purpose?', 'Why do you exist?', 'What do you do?', 'How do you do

it?', 'What is your positioning in the market versus other competing brands (and this doesn't have to be other charities!)?' But it is mostly about creating an emotional connection. What makes you distinct? What makes you different?

"Once that is clear, there is the tough job of cutting through the clutter and noise. The UK charity market is big and it is competitive. So, you create brand assets that tell that story and connect both rationally and emotionally (system one & system two), and you activate that brand across the channels that are relevant to your audience."

### Ahead of the game

Many charities are already working hard to access a younger donor base, due in part to a surge in interest from this demographic over the course of the pandemic. Michelle Vickers, CEO at the Head and Neck Foundation says Generation Z joined millennials as its primary donor base during this period.

"We mostly target these groups through paid fundraising events and social media influence," Vickers explains. "We facilitate events such as the London to Brighton bike ride which has brought many young donors and fundraisers into the charity. Big events such as our Glitter Ball also helped bring in a younger audience as we can tailor the event to their needs."

"Both Generation Z and Millennials use technology to get information. Most young people use social media, so we promote our mission, upcoming events, and fundraising goals through social media."

### Remaining relevant

But while charities need to ensure

their branding is relevant, it's also important not to alienate an older audience. Enthuse's Tullins explains that while younger supporters are more likely to donate online, the organisation's research shows an increase in online donations being made across the board, including 38% of 40-54 year-olds and 29% of 55-64 year-olds.

"The two age groups saw a 4% and 7% growth respectively from three months prior. This is the highest percentage of online donations being made in a quarter that we've seen, despite lockdown restrictions loosening. "The temptation is there for charities to focus solely on digital fundraising, as it isn't subject to last-minute cancellations like an in-person event. While digital fundraising is a vital income stream, charities would be wise to take a hybrid approach to ensure their fundraising campaigns are inclusive."

However, Born Ugly's Bruijtel argues that charities don't need to strike a balance. "This isn't a zero-sum game of one or the other," he says. "The truth is that it isn't just younger generations that are well-connected. The majority of Gen-Y, X, & baby boomers are highly digitally versed. Remember, these are the generations creating the tools for Gen-Z & Alpha!"

### Transparency

So once charities have attracted this key demographic, how do they hold onto them? Bruijtel suggests transparency will be key in retaining a younger donor base, who typically have stronger ethics than older generations. "While Gen-Z and Gen-A are driving a lot of this forthcoming change, younger audiences are much more demanding

and less trusting of charities than older generations. They are driving a real attitudinal change to charities."

"Firstly, they are the audience that – surprisingly – is most likely to volunteer and offer their time to a cause they care about. But, they have a natural distrust of big monopolistic players. They despise charities that have fat cats at the top with big salaries. Their expectation is that charities do charity work, for no other purpose than to do good."

With this in mind, its essential charities prioritise transparency to allow donors to see the impact the charity is making in both real and tangible terms. "They expect charities to be relevant, tapping into what is important to them. Rather than support a charity, they are much more likely to support a cause and an issue that has real-world impact. And they want their support to fit conveniently into their digital lives, to give them control and to have micro-immediacy."

While it may not be a simple audience to conquer, the benefits are certainly vast. Younger people are much more likely to be engaged and motivated to support a cause that matters to them long-term.

"It's too easy to say that young people are our future but that's because they are. They are potential lifelong supporters and hopefully will go on to advocate for the cause to later generations," Vickers explains.

Bruijtel concurs, concluding: "If you get them, they'll support you fervently. But be relevant and transparent. You must accept that they poke through disingenuousness and in-authenticity. Be open, transparent, and honest, and they'll forgive any mistakes you make (so long as you own up to them)." ■

# Top 10 tips for attracting young philanthropists

A round-up of the key tools for engaging with wealthy young people.

WRITTEN BY MELISSA MOODY



Charities are in the perfect position to attract the newest generation of philanthropists as millennials and Gen Z look to change the world around them, but methods might be different from other generations. We take a look at some of the top tips for raising attracting and retaining the attention of young philanthropists.

## 1. Know the difference

It's important to understand the differences that both generation Z and millennials bring to the table. Generation Z grew up in a world where the internet and use of smartphones are part of everyday life, and while millennials have had similar experiences, they are much less dependent on technology. Both generations have witnessed global issues ranging from economic downturns, domestic and international safety concerns, gender inequality, racial injustice and climate change in addition to a global pandemic. These experiences have shaped who they are, what they believe in and what they are passionate about, which has, in turn, influenced the change they want to see in the world.

## 2. Be social

Young people have spent much of their young life online, notably on a variety of social media channels. So, to keep charities in their mindset, you should be visible on these platforms. Identify what they use the most and make sure you are creating consistent content to showcase the work of the charity and encouraging them to donate. Make sure you know the difference between different social media platforms too. Facebook has a markedly different

audience than TikTok, for example, and a completely different style of posting is necessary for each. The same content doesn't work across multiple platforms.

## 3. Identify philanthropists who identify with you

Millennials make up a large part of today's workforce, balancing the demands of building a career, raising a family and giving back to the organisations they're most passionate about. Both generations are more inclined to give to organisations that directly reflect their values and current societal and economic issues, making a somewhat emotional connection before gifting.

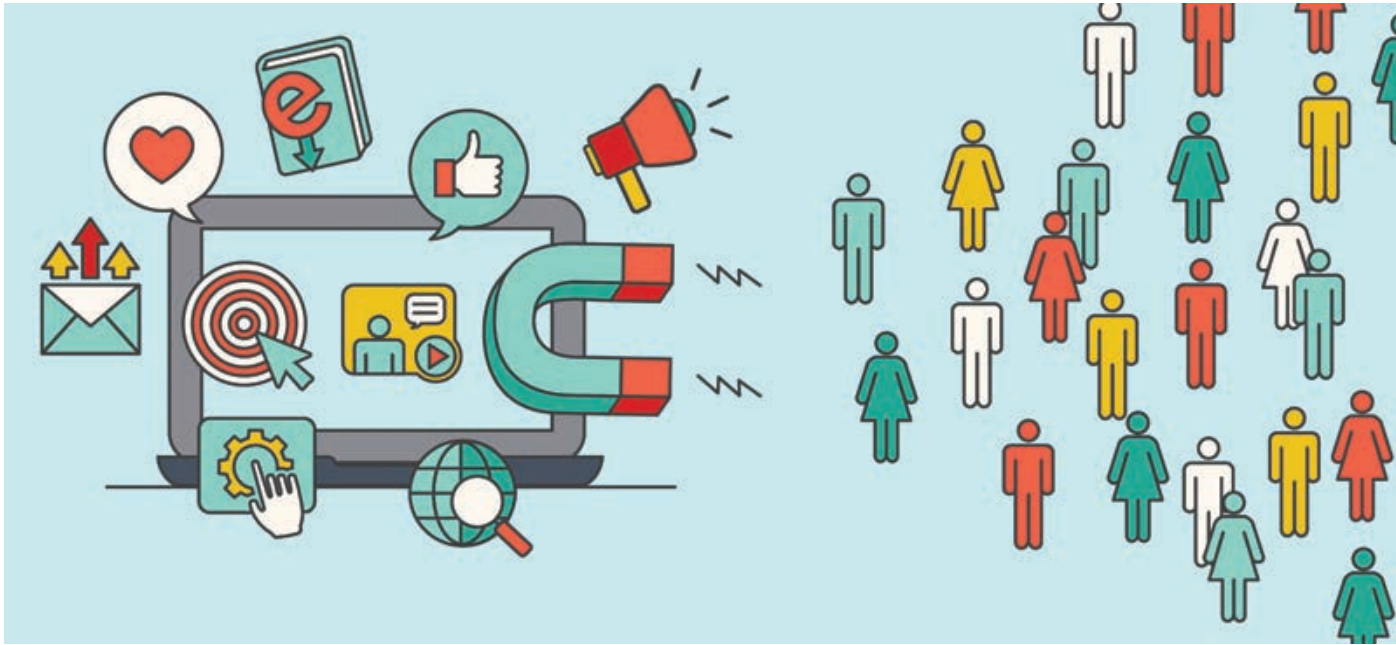
## 4. Be clear about the benefits

Because of the social-media centric world generation Z have grown up in, they put greater focus on the public recognition they will receive from their actions, particularly online or in the presence of their peers. Find subtle ways of reminding them of this by encouraging a post on social media about their donation.

## 5. Impact aware

Young philanthropists want to see the impact they've had through the charities they support. They believe in the power of collective change





and want to be see the fruits of their donations. You should be transparent in your communications, building trust and consider using the impact of their financial gifts, the value of volunteer time and personal stories to show the impact they are having on society.

#### **6. Clear messaging**

Take the time to get the messaging clear for exactly what you're trying to accomplish; whether it's a donation towards a specific program or a regular contribution, and reiterate the charity's goals as a whole. Make sure it is both intellectually clear and emotionally engaging, which will then help you make a case and encourage donations.

#### **7. Meet and greet**

Sometimes, the easiest way to entice donors is through conversation. There's a reason why networking is still some people's favourite method – even after the events of the

pandemic. Hosting, or going to events where young philanthropists will be and talking to them about the work of your charity could be the simplest way of enticing them to give. Give them your card, or a link to a social media account where they can see the work after your discussion.

#### **8. Show, don't tell**

Depending on how you look at it, it could be a good or a bad thing that the rise of social media means that young people's attention spans have drastically shortened. A shorter attention span means they're less likely to read reams of text on an email and are more likely to engage with visual content. Use this to your advantage and create aesthetically pleasing content, such as videos and infographics, which will catch their attention and cause them to linger. Show them what you are achieving rather than expecting them to read or research it themselves.

#### **9. Show appreciation**

Everyone likes to be thanked, or at least acknowledged for the good things they've done. Arguably one of the smallest and easiest things to do, it can create the biggest impact. It can be as simple as sending an email saying thank you, or, if the situation demands it, a phone call to acknowledge the donation and explain what it will be used towards.

#### **10. Make it easy**

With everything at their fingertips, young people are more likely to click away or change their mind if the donation process becomes complicated. Make sure you have an easy-to-see donate button on a website that has been optimized for mobile and tablets as well as desktop. Social media can also be used again to link to the website, hold or advertise fundraisers or give case studies that can then link to a donate button. Sometimes the simplest option, will give some of the biggest rewards. ■

# How charities are tackling their links to slavery

We take a look at the charities seeking to address their history as part of a wider commitment to equality, diversity and inclusion. **WRITTEN BY JOE LEPPER**

**T**here is no escaping the horrific colonial legacy of the UK's economy. Sadly, charities have been no exception, with many in recent months facing up to their links with slavery and the UK's shameful history of oppression.

For some charities, this acceptance has been addressing the origins of endowments from families and businesses with links to slavery. For others, particularly long running charities set up hundreds of years ago, it has been removing the names of slave trader benefactors.

For the heritage sector, facing up to the slavery links to some of the properties and treasures they oversee, has also been key.

Here we look back at the charities that over the last year have sought to tackle their links with historic slavery as part of a wider commitment to equality, diversity and inclusion.

## Barrow Cadbury Trust apologises for "historic injustice"

In July 2020, grant giver the Barrow Cadbury Trust began investigating the origins of its endowment, from Barrow and Geraldine Southall Cadbury in 1920, which had originally come from the Cadbury Brothers chocolate and cocoa business in the 19th and 20th centuries.

This investigation included looking into Cadbury's links to plantations in São Tomé and Príncipe in Africa. It was thought that these involved indentured labour, a system of bonded labour tying workers to a contract for a set period of time.

But in July this year, it revealed that these plantations, off the west coast of Africa, had used enslaved people from Angola at the end of the 19th century and at the start of the 20th century. It also emerged that even though the chocolate company was alerted to the slavery concerns in 1901, slaves continued to be used for a further eight years.

Trust chair Erica Cadbury has apologised "unreservedly" for this "historic injustice" and pledged to "renew our commitment to deepen our engagement with modern day racial inequality across all of our work".

## Charity organisations disown slave trading benefactor

Sir John Cass was an English politician and merchant in the 17th and 18th centuries who was involved in the slave trade.

His name has also been used by two voluntary sector organisations, education charity Sir John Cass's Foundation and the Cass Business School, which runs voluntary sector research unit The Centre for Charity

Effectiveness.

This year, both organisations decided to act to remove his name from their branding to purge themselves of this uncomfortable link to Cass, who was a leading figure in the Royal African Company, which traded in slaves.

Sir John Cass's Foundation has rebranded this year as the Portal Trust, which allows the organisation to continue supporting education projects "without reference to our founder's historical connections with the trans-Atlantic slave trade", said the charity's chief executive Richard Foley. The Trust has looked to further disown its slavery links with a programme of change including the appointment of an independent diversity consultant.

Monica Tyler, chief executive of charity Vauxhall City Farm, one of the beneficiaries of the Trust, welcomed the move, praising the name change as sounding "as far away as you can get from Sir John Cass's Foundation".

She added: "The Trust shouldn't be there to uphold an out-dated dignitary, and instead be responsive and relatable to their beneficiaries. Now I believe we have renewed purpose from the Trust and a new name and brand for which they should be applauded."

Meanwhile, City, University of



London's Cass Business School is changing its name this year for the start of the 2021/22 academic year to Bayes Business School, to free itself from Cass's name. It will now be named after 18th century theologian and mathematician Thomas Bayes.

The name change is part of wider efforts by City University to address inequality, including funding five PhD scholarships for Black students. The Business School has also set up a diversity and inclusion council.

### **Joseph Rowntree charities "deeply sorry" for slavery links**

A number of Joseph Rowntree charitable organisations are taking action

to address their benefactor's "shameful" links to slavery and colonial past. The organisations have endowed with large share holds by the Rowntree family's confectionary company, which benefited from slavery.

Involved in addressing the past is The Joseph Rowntree Foundation, the Joseph Rowntree Housing Trust, The Joseph Rowntree Charitable Trust and Joseph Rowntree Reform Trust.

They made a statement earlier this year after research by the Joseph Rowntree Society looked at the company's links to slavery, colonial indenture, racial discrimination, and anti-union tactics.

A statement from the Joseph Rowntree Foundation and Joseph Rowntree Housing Trust said that they are "committed to recognising and learning from every part of our history" adding "it is especially important to us that the experiences of people whose labour was taken under duress and slavery should occupy a more prominent place in the Rowntree story". They conceded: "We should have done this much earlier."

The charities are funding further investigation into their history and the Foundation and Trust have pledged to increase diversity within their own organisations as well as review whether it can better use its



funding, partnerships and campaigning to tackle racial inequality.

## Statue toppling pre-empts name change

For a number of years the diverse Bristol arts scene has had an uncomfortable relationship with venue Colston Hall, which was named after slave trader Edward Colston and is run by charity Bristol Music Trust.

Bristol band Masssive Attack was among the high profile opponents in the arts, vowing not to play at the city centre venue while it was associated with Colston.

In 2017 the charity pledged to drop the name to be timed for the completion of refurbishment in 2020.

During 2020 greater urgency was

injected into the name change when Black Lives Matter protestors very publicly toppled a statue of Colston and dumped it off a harbour wall.

Finally, in September 2020, three years after it was first promised, a new name was unveiled, and the venue is now known as Bristol Beacon.

According to the charity: “We can no longer be a monument to someone who played such a prominent role in the slave trade. “This is an opportunity for a fresh start and a chance to play our part in creating a fairer and more equal society.”

## National Trust slavery report sparks controversy

Families across the world have

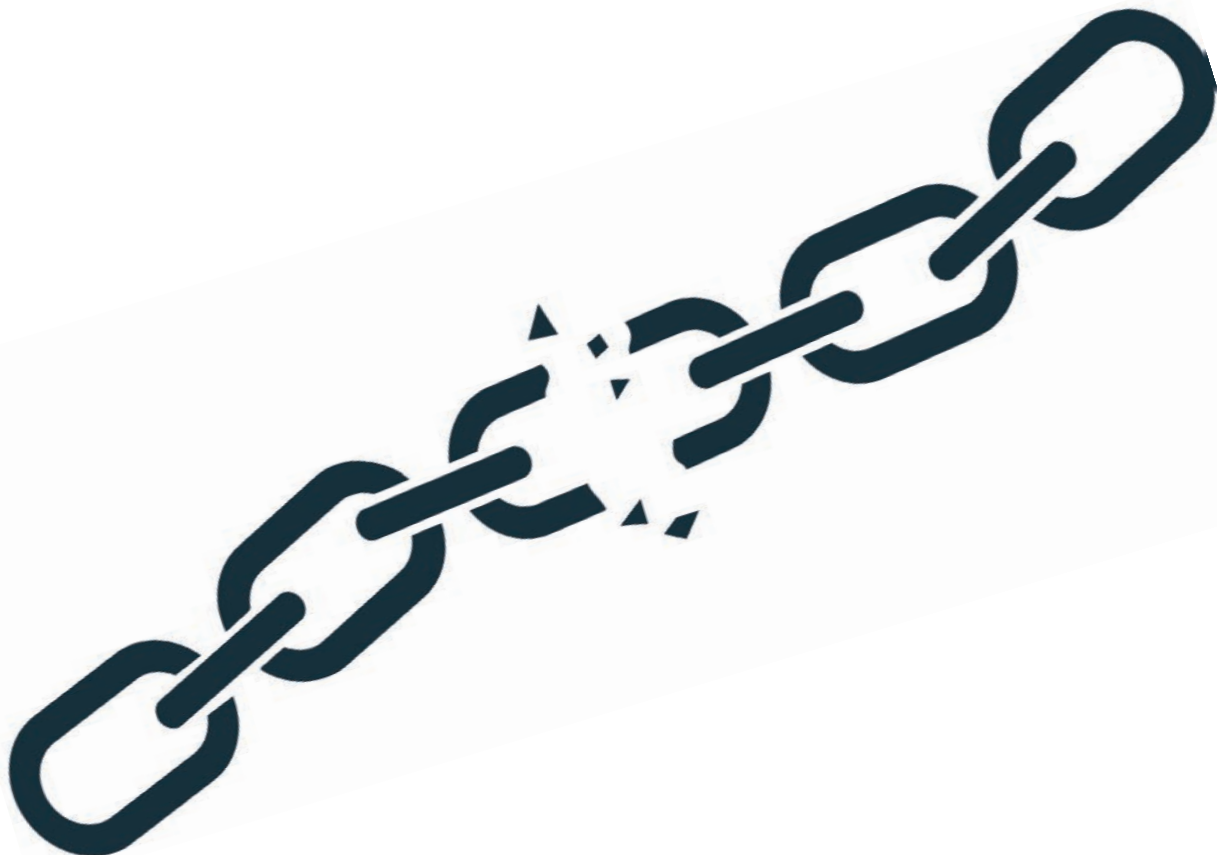
long enjoyed the stately homes and grounds managed by the National Trust.

However, many of those properties were built on profits from colonialism and slavery.

The charity took action in 2020 to address this by releasing a report to publicly highlight these links.

This move proved divisive with some of the charity’s members applauding the charities’ honesty in addressing the uncomfortable origins of some of its properties, while others accused it of acting outside its purpose as a charity.

The Charity Commission intervened to investigate the concerns and earlier this year found they the National Trust had not breached charity law. ■



# 2021

charitytimes Awards

## SHORTLIST ANNOUNCED

**9 September 2021**

**London Marriott Hotel, Grosvenor Square**

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

Supported by

Charity Partner



**@CharityTimes #CharityTimesAwards**

**Celebrating best practice in the UK charity and not-for-profit sector**

# Friend or foe?

**Everyone needs help sometimes, so why has a survey revealed that trustees are more inclined to go to their peers for help than a regulator or industry body?**

WRITTEN BY MELISSA MOODY

**T**rustees are more inclined to rely on fellow trustees and colleagues for help, rarely seeking support from the Charity Commission and other advisory bodies, a recent survey has revealed.

The survey, carried out by Yonder and published by the Charity Commission found that almost half (46%) look to colleagues or another trustee for help 'several times a year' whilst only one in ten trustees turn to the Charity Commission, another charity or advisory body for support just as regularly. But what is preventing trustees from seeking the support of sector regulators?

Penny Wilson, CEO of Getting on Board, believes one reason is because trustees genuinely don't know the Charity Commission has got the guidance in the first place. She points out that that it was very recently that it started to send out a welcome pack when a trustee is appointed, so up until recently "the commission has had very little to do with individual trustees."

But Andrew Tuggey, chair of UK Community Foundations, says it could just be the case that people tend to be more content talking to others in a similar position. "Peers are colleagues and are closer so individuals may feel it's easier and more comfortable," he says.

Louise Thomson, head of policy at The Chartered Governance Institute (CGI) agrees, suggesting that part of

the reason could simply be down to human nature. "I think that it's human nature for people to prefer asking people they know for advice, rather than people they don't know." But other reasons, she adds, could include a lack of awareness of guidance and support, inability to easily find the guidance and the perception that dealing directly with the commission might give it a reason to look more closely at the trustee's charity. "Some reasons may be more realistic than others, but the perception of incurring unwanted interest can be overwhelming if a person is already unsure about something."

## Unwanted attentions

It's thought that some trustees may feel apprehensive about going to a regulator in fear that it will highlight an issue, prompting the regulator to open an investigation if anything is wrong. Thomson admits that this could be a very real concern for some individuals. "This could be reinforced by the positions of staff and other trustees if they are generally nervous about their own relationship with the regulator."

However, Paul Ridout, partner in the charity arm of Hunters Law believes that if trustees are scared about going to the regulator, then "the person concerned may not really understand their legal obligations and responsibilities as a

charity trustee." In his experience, it's not so much fear of the regulator that keeps trustees back, it's the perception that it won't be easy to get the specific answer they're looking for.

He points out that some commentators have, in the past, warned trustees not to ask the commission for advice, for fear that it might lead to an investigation, "but most trustees these days know that the commission's main regulatory tool is providing guidance to help trustees comply with their duties".

In some situations, communication with the commission cannot be avoided and trustees are under duty to approach the Charity Commission, as in the case of reporting a matter, which falls within the scope of a serious incident report, namely an adverse event – whether actual or alleged – which results in or risks significant harm to the beneficiaries, staff, and volunteers of a charity or others, who come into contact with the charity through its work; loss of charity funds or assets (including the reputation of the charity); damage to the charity's property; or harm to the work of the charity's reputation. In which case, commission advice is perhaps the best place.

## Communication is key

But do trustees even know the



support is there for them? According to research from Getting on Board, 30% of charities don't offer any induction to new trustees, so it appears that there firstly needs to be consistency across the sector. Wilson adds that in the charity's experience, those who do offer a trustee induction also don't do it as comprehensively as they might, and don't commonly signpost potential wider sources of support and guidance.

"I think there's a really big difference between trustees who work with or for charities in their day job, or who volunteer for charities and trustees who work in a completely different sector in their day job," Wilson explains. "If you already work in the charity sector, you'll probably be quite aware that the commission isn't just regulating, but it's guiding as well. And you'll also be really well aware of other sources of help...but I think you're not going to know about them if your day job is with an SME or a university. You just wouldn't know about those places."

Thomson believes there is an abundance of services, activities and

resources already out there for trustees, the issue is the communication. "Many infrastructure bodies will speak directly to members, but those outside of the membership may not be as familiar with the services offered. For charities with staff, there may be a disconnect between what membership the charity has access to, and the support services the trustees are aware of."

It may also be the case where the chair is the named member of the support organisation and doesn't always manage to pass on information. "The person organising board meetings, such as the governance professional, should be providing regular updates to trustees about issues affecting the sector, including updates from the Charity Commission and their professional advisers," explains Thomson. Those updates could be incorporated into the trustee meeting, in a development session or be part of a regular board communications plan."

But Tuggey says that more in-house support from senior and more experienced trustees is also needed particularly when "coupled with linked support from CEOs. Digital national and regional workshops with peers from other charities are always useful also."

### **The next step**

So how can regulators and advisories encourage trustees to come to them for advice? Having the right content and communicating it effectively seems to be the answer. The commission's five-minute guides have been heralded by experts as a 'helpful' way of getting messages out to trustees, and perhaps more of this type of guide could help, but the website could be more user-friendly,

explains Tuggey. "The [Charity Commission] website is good and has excellent advice but it is a little austere and not as user-friendly in terms of graphics as it might be. Links to video clips with diverse and real-life trustees would be useful."

Wilson concurs, revealing that the commission is investing in more direct trustee communications with the aim of setting up a portal trustees can go to for advice. "They'll be able to have more of a one-to-one relationship, which will be really good because it'll just remind trustees that this source of guidance is there."

Thomson also suggests that individuals with an awareness of the range of sources available should be sharing that information and promoting sources they believe to be trustworthy, accessible and helpful. Word of mouth and personal recommendations, as the research alludes to, can be seen as a trusted source of information.

However, she adds that the challenge the commission faces is to underline the risk-based approach of the regulator and case law in assessing the way trustees are performing their legal duties. "There are some issues that rightly attract the attention of the media when things aren't right, but there are also thousands of charities backed by trustees trying their best and delivering for the communities they serve.

"The overarching message should be that there is always something a trustee could learn or do better and that the desire to improve their understanding and actions will ultimately lead to a more positive outcome for the charity and its intended community," she concludes. ■



Better Society  
— 2021 —  
AWARDS



**2 December 2021**

**London Marriott Hotel, Grosvenor Square**

**BOOK YOUR TABLE NOW**

**[betersociety.net/awards](https://betersociety.net/awards)**

Gold Sponsor:



Charity Partner:



Supported by



Organised by:



 **@CTBetterSociety #BetterSocietyAwards**

**Celebrating the efforts commercial organisations make to create a better society**

## OPINION

# “We’ve learned a lot about what people really want and need from us”

**As part of a new series, we look back at how the pandemic affected UK charities. For Guide Dogs, challenges still lie ahead, but so does a bright/er future.**

WRITTEN BY PETE OSBORNE, DIRECTOR OF OPERATIONS, GUIDE DOGS

There’s no two ways about it, Covid-19 came at us like a tsunami. You could see it unfolding in front of you and you knew you were going to be in crisis mode for a long time.

I’ve been a guide dog owner since 1990 and I understand the real difficulty during those periods where you are without your dog. When we realised the pandemic would impact our ability to support those with sight loss, I immediately thought of the many people who’ve told me over the years that they wouldn’t be able to live their lives fully without our support.

We initially forecast a significant drop in fundraising revenue and had to act accordingly. We had to furlough staff, causing understandable concern throughout our organisation, and it looked like we were in for a long and rough ride. However, I knew that for anyone with a vision impairment there would be a deeper sense of crisis.

We had to adapt and find a way to be there for people with sight loss more than ever before. So instead of face-to-face support, we set up and

conducted thousands of keeping in touch calls and made sure all the most important and up to date information people might need was available online.

I heard stories about people we support who were shielding who had no food at all, creating a sense of panic that I vividly remember. Before we changed this – with our campaign to the government – our staff stepped in where they could, because as someone said to me: the shop down the road “might as well be a mile away” if you can’t get out of the house.

Despite the challenges, I am so proud of what we were able to achieve. For instance, we absolutely had to find boarding for hundreds of our dogs across the country, and thanks to our amazing staff and volunteers, we did that within about a week. At board level, oversight from our trustees became even more important, as meetings became more frequent, but shorter and more focused.

Early on in the crisis, our fundraising team took the bold decision to invest. We turned to television advertising which was, at

that time, struggling, and as a result dramatically falling in price. This game-changing move meant we were able to maintain levels of awareness and lead to a record-breaking fundraising year. Our amazing supporters stepped up in huge numbers and, in doing to, they have allowed us to make the charity fitter and stronger for the future.

This support meant we could fast-track elements of our ‘By My Side’ strategy, bringing forward investments in our centres, our frontline staff and our digital infrastructure, so we can support more people and meet the real and changing needs of the sight loss community.

We’ve learned a lot about what people really want and need from us, and we recognise we still have a major challenge on our hands. Many people with sight loss are worried about what the new normal will be like and whether they will be included. The pandemic hit us hard but every guide dog partnership we qualify, every person we pair with a sighted guide, every child and family we support, is a step on the way towards a brighter future. ■

# The retail revolution

Restrictions during the pandemic meant that charity shops were forced to close doors.

Now they've reopened, a whole new set of challenges has emerged.

WRITTEN BY MELISSA MOODY

Charity shops were closed for the majority of the pandemic, triggering a significant decline in income for many charities. As soon as they opened, supporters came out in their droves and sales soared, but that doesn't mean the challenges have stopped.

"Charity retailers have had to manage considerable uncertainty over the past 18 months with three separate lockdowns requiring charity shops to close," explains a spokesperson for the Charity Retail Association.

Louise Harbour, regional retail director at BHF adds that the closure of its charity shops and cancellation of fundraising events meant that net income fell by roughly 50% in 2020/21 and, as a consequence, it had to cut the amount it invested in new research by half.

"During this turbulent period, we worked with the Charity Retail Association to appeal for government support, including through extending the 100% business rate relief until March 2022," Harbour says.

This was partly successful with the government announcing in the budget that the support would be extended until the end of June 2021 to help charities get re-opened and sales back on track.

When examining some of the challenges charity shops have faced over the past 18 months, logistical

ones initially spring to mind. "Once reopened, charity shops looked very different with new signage and layouts to help manage social distancing, closed changing rooms and lots of cleaning and hand sanitiser in use," the spokesperson adds. "There were also changes in the way that donations were handled with an initial requirement for goods to be quarantined for 72 hours before being put on sale."

## Shop 'till you drop

Despite uncertainty around openings, trading has been encouraging as the public's appetite for shopping remains hearty. "The appeal of charity shops to the public remains undimmed, with many returning customers buying more than they usually would, which helped compensate for an initial dip in shopper numbers" the spokesperson says.

Reports suggest that since the last lockdown, most weeks are seeing higher sales volumes than corresponding weeks in 2019. The appeal of charity shops is thought to be expanding as people become increasingly keen to find a bargain after the financial struggles over the last year and look to shop in a more environmentally-conscious way.

Harbour also notes that sales are strong and haven't fallen in line with footfall. "Throughout 2020 we had

several locations across the four nations whereby non-essential retail was closed. However, each time we reopened, we were able to recover quickly." In fact, on its first day of reopening on 12 April 2021, the charity took a record-breaking £1 million in sales.

However, donations have become one of the newest challenges. "The generosity of the public in saving up their donations whilst shops were closed has been a big positive and has underpinned strong trading. However, managing increased donations has been a challenging task that has required creative solutions such as setting up separate donation centres as well as sourcing additional storage," the CRA says.

To combat the issue, both BHF and Oxfam launched a free online postal donation service, which Harbour says "proved extremely popular", and is something both charities plan to continue.

Its shops have also seen strong sales, but cautions that it won't know the full impact of the pandemic on its long-term retail income until it has been able to assess shopper habits. "With the general shift to online shopping and the loss of high-street retailers, there will unquestionably be challenges for all shop-based retailers in the future."

One of those challenges has hit sooner rather than later. It's

# Charity Shops

estimated that volunteer numbers are down 20% across the charity retail sector, and the British Heart Foundation has seen its numbers drop 14%.

Health concerns have been one of the biggest worries, particularly for those who are clinically vulnerable. But for some volunteers, the closure meant they instead found other ways of volunteering instead. Although its numbers are down, the BHF has seen an uplift in younger people wanting to take up volunteering opportunities.

The charity is taking advantage of this new demographic and is trying to entice volunteers through highlighting the benefits the role can bring. “[Volunteers] have the opportunity to gain a nationally recognised qualification that will aid employability,” in addition to promoting the new digital roles that have come about since the start of 2020 where volunteers can research, photograph and list items for the BHF’s online stores.

## Moving online

Perhaps earlier than expected, digital solutions have been one of the biggest saviours of charity retail over the course of the last year, with the number of retailers online increasing over 70% in the last year. It then begs the question: are high-street stores still needed?

Yes, says the Charity Retail Association. “There is no doubt that online activity has increased considerably as a result of periods of closure. However, charity shops need high streets as much as high streets need charity shops.”

It argues that as items are naturally of a second-hand nature, it makes them unique and therefore isn’t practical to photograph and list each



individual piece online. For lower value items, it wouldn’t be financially viable because of the costs of postage and packaging.

The BHF has taken a positive approach to the move online. “We are already embracing the move to online shopping and see this as a key part of our future.” The charity already has a successful eBay store and a ‘fantastic’ response to its Depop shop, which appeals to a younger audience. Similarly, Oxfam saw a 46% growth as its customers turned online hunting down second-hand books and homewares through the lockdowns. Rachael Huttly, head of retail marketing at Oxfam explains that “as life has slowly returned to normal in the UK, we have continued to see our online shop flourish,” recently launching a new online platform to offer online shoppers a better experience.

## A bright future

But, retail on the high-street isn’t over yet. “We still believe that charity shop enthusiasts will continue to want to see us on the high-street. Part of our charm is the thrill of hunting out that unique item or spotting a piece that has the potential to be transformed,” Harbour adds.

Huttly agrees: “There will always be an important place for high street charity retail. Oxfam shops are at the heart of their local communities and we have seen strong and encouraging sales since shops have reopened to the public.”

So, despite the challenges of the last 18 months, it looks as though both charities and high streets are persevering. As the Charity Retail Association concludes: “we still see a bright future for bricks and mortar.” ■



# Top 10: Virtual event platforms for charities

**Restrictions may have eased, but virtual events continue to be desirable for charities looking to cut costs and reach audiences further afield. WRITTEN BY JOE LEPPER**

**F**rom conferences to fundraising campaigning, the Covid-19 health crisis has radically altered how charities manage their events. With social distancing restrictions in place for the past year and a half, almost all face-to-face events have either been cancelled or postponed. In their place, charities have successfully turned to digital solutions by staging live streaming events. This has enabled staff, volunteers, beneficiaries, and stakeholders to still watch and take part during a difficult time for charities.

Despite restrictions now having lifted, many charities have found such virtual events simple and cost-effective alternatives to in-person events. As a result, many charities are now seeking to continue using digital solutions, mainly as part of hybrid event management plans that combine digital and face to face participation. This keeps costs low and makes attendance more inclusive nationwide. Ahead of this 'new normal' for charity events we look at some of the digital event platforms available to the sector.

## 1. Zoom

Whether staging a one-to-one meeting or a conference with a 1,000 strong audience, Zoom has been a

staple for charity event managers in recent years. Its range of paid for plans allow charities to organise events to suit different audience sizes. For example, a £119.9 a year licence offers charities the chance to stage small meetings of up to 100 participations. Meanwhile, plans starting at £480 cover a 1,000 strong audience.

## 2. GiveStar

Previously called TapSimple, fundraising platform GiveStar offers a range of virtual event tools aimed at the charity sector. This includes video conference, live stream and ticketing functions as well as built in fundraising features for attendees to donate during the virtual event.

## 3. Enthuse

Enthuse is another fundraising platform that offers virtual event options for charities, including virtual runs and quizzes. This includes tools to stage virtual fitness challenges such as race day events. It allows those taking part to set targets as well as post automated milestones to online fundraising pages.

## 4. BigMarker

A range of tools to customise events is a key selling point of virtual event

platforms such as BigMarker. It offers a range of features for a variety of events, from webinars, summits and virtual conferences. Options cover elements of a virtual event such as welcome page, ticketing options as well as check-in, agenda and question and answer sessions. Pricing ranges from £57 a month for a 'starter plan' for 100 attendees to options to host mass events costing up to 10,000 people. There is also a 'premier option for up to 1,000 attenders, costing £215 a month

## 5. Hubb

As well as recorded or live streaming events online Hubb is among platforms highlighting 'hybrid' options for events management, which helps charities create a digital element to in-person events or stage separate face to face and virtual sessions within the same conference.

## 6. Eventbrite

Eventbrite is widely used by a range of sectors and was involved in the running of 4.7 million events in 2019. It offers a range of tools to run virtual events such as live video content integration using video conferencing platforms such as Zoom and Vimeo. Other virtual



event tools on offer through Eventbrite involve attendee emails and reminders as well as options to monetise events and link in online content. It also offers a range of resources and guides on virtual events issues such as using online hosting platforms to pricing events. Digital tools to enable virtual coffee mornings and live streaming quizzes are also available.

### **7. Tiltify**

This platform is suited to charities looking to run gaming and other live streaming fundraising events. Its range of tools include personal dashboards to manage fundraising, adding incentives into events to donate as well as scheduling an on-screen alert option. Charities to

use Tiltify for virtual event management include Comic Relief, which used it for a Dungeons and Dragons style fundraiser involving comedians including Nish Kumar and Sara Pascoe. This raised £25,000 for the charity.

### **8. Ivent**

Ivent has a range of charity specific virtual event tools including running volunteer conferences and seminars. Webcasting, networking options such as web and video chat as well as social media integration are other tools available though its virtual event options. Pricing options are available on request.

### **9. Splash**

This platform offers options for

running virtual, hybrid as well as in-person events and is integrated with a raft of live streaming and video platforms, including Zoom, Vimeo and Twitch. Splash can also be linked in with online collaboration platforms including Slack.

### **10. Bizzabo**

Another events organisation to offer a range of virtual options for charities, such as live streaming and on-demand videos, includes Bizzabo. Functions the company offers include a networking and event app as well as measurement options so charities are able to analyse the performance of events and see how they are driving return on investment. ■

# 'We've made a conscious effort to make sure leadership is visible'

With every charity facing unique challenges over the past year, Dogs Trust's chief executive Owen Sharp explains how its coped with restrictions whilst keeping tails happily wagging. **QUESTIONS BY MELISSA MOODY**

**Melissa: How has Dogs Trust fared through Covid-19?**

**Owen:** I'm happy to say that Dogs Trust has fared incredibly well over the past year. Of course, it's been a challenge – we've had to respond to the pandemic, as all organisations have, by developing different ways of working and finding ways to deal with the restrictions. But with challenge comes opportunity. Through necessity we've found new ways of working and, crucially, we've managed to remain the voice of dogs throughout the crisis.

It goes without saying the charity's faced significant financial pressures, and we've yet to see the full impact. But we're extremely fortunate to have a loyal community of donors who have been very supportive and we've taken steps to save money where we can. Ordinarily, face-to-face activity is a core component of our fundraising, for example, so when you have to move away from that you need to find other ways to connect with people.

It's been a tough year, as tough for us as for anybody else. But if you were to ask me, after all we've been through as an organisation during

the pandemic, would I still have taken the job if I'd known what was around the corner? The answer is an emphatic yes, there is nowhere I would rather be.

**Melissa: What have been the biggest challenges for the charity during this time?**

**Owen:** The huge spectrum of what Dogs Trust does as a charity meant we had to make some huge changes in response to the pandemic restrictions. So much of what we did relied on face-to-face interaction so having our interactions with people – dog owners, donors, volunteers, adopters, trainers – ripped away, virtually overnight, was a shock to the system.

As we're a national charity, working to support dogs and dog owners across all four nations of the UK, we had to respond to each nation's own set of restrictions. This meant ensuring we were looking after staff facing vastly different sets of experiences throughout.

**Melissa: How have you been keeping staff motivated?**

**Owen:** I have to be honest – keeping

staff motivated during the pandemic hasn't been that hard! Our staff are a committed, supportive community and they have done a fantastic job of supporting and motivating each other over the past eighteen months.

With people working remotely, it's made us up our game in contemporary communications. We've made a conscious effort to reach out to staff and ensure leadership was visible during a challenging time. We've held regular briefings for all staff; used more video so that staff could experience some human interaction, shared good news stories, celebrated successes and tried to inject some fun where we could.

Also, though, it's been a time to have honest conversations about what they've been thinking and feeling. It's been important to acknowledge what a difficult time it's been for everybody and that all of our mental, emotional and physical wellbeing can suffer. We've reached out to our community of staff and volunteers to let people know that we understand, and that we're here to listen and support if they need us.

**Melissa: How has Covid-19 impacted the working environment at Dogs Trust?**

**Owen:** I think few would deny that Covid has had a huge impact. But being where we are now, we need to look back and find the positive. In hindsight, I see now that we were too wedded to assuming that people must be in their workplaces for the business to operate efficiently. We've learned this simply isn't the case; we can work differently without a loss of productivity.

I don't want to give the impression this has been an easy journey and we still have a lot to do to get the balance right. Dogs Trust employs lots of people who work giving hands-on care and have been essential frontline workers, this is work that can't be done from home. Thinking back to the depths of the winter we've just lived through, of course it created tensions when some of the workforce were up and out in the dark mornings, knee-deep in mud, while some of their colleagues were cosy at home working from their sofas. We also faced issues with availability of staff, when people needed to take time off work or to self-isolate.

Overall, though, people rolled up their sleeves, got on with it and helped each other out. We have a strong community who are passionate about what they do and when all's said and done – we got through it, together.

**Melissa: How has social media changed the way Dogs Trust works?**

**Owen:** Social media is a hugely important tool for. On one level, it's an effective outlet for our everyday business of re-homing dogs and connecting people with dogs. On



another level it's a way for us to give people an insight into our mission. It's also a way to connect with dog owners to advise them on the issues that we're experts in – a continual drumbeat of welfare and behavioural messages, such as tips for dogs in hot weather and dealing with behaviour problems caused by the recent changes. Social media gives us a platform to amplify our voice and reach people without needing to spend money on advertising, which as a charity, is critical.

**Melissa: What does the future look like for the Dogs Trust?**

**Owen:** After the pain of the last year, I'm very excited for the future of Dogs Trust. Challenges lie ahead, particularly as we emerge from the pandemic. It's hard to predict how things will look in a year's time but

we do know the dog population has suddenly increased so we know there will be an impact as people start to adapt back to their 'real' lives. Dog welfare will be a huge national concern and we must ensure we're ready to support dogs who end up relinquished to us. We'll need the help and generosity of our donors, perhaps like never before.

We have some exciting goals to work towards as we begin to understand the impact of the pandemic on the lives of dogs and their owners. One of our goals is to ensure we stop problems as early as we can; the earlier we can be involved to help, the more we can prevent it getting to a point where heartbroken owners are having to give up their dogs. We aim to be there for dog owners every step of the journey. ■



# How to maintain good employee mental health

Our top tips for ensuring mental health remains a priority in your workplace post-pandemic

WRITTEN BY MELISSA MOODY

**A**s flexible working becomes the norm, maintaining good mental health for employees is as important as ever whilst people adjust to a 'new normal'. We provide a round-up of the top tips for looking after your staff:

## 1. Open conversations

It's been a hard year for everyone. One of the best things to do for your employees is to acknowledge this and have open conversations about how it's affected everyone. Some people might have taken the opportunity to start running, or take up a new hobby, whereas others may have struggled with furlough or isolation. Discuss struggles, and how they can be overcome.

## 2. Be patient

Even as restrictions are eased and employees begin to venture out and into offices more, some might still be anxious about returning into the world. Thankfully, flexible working has become more normal, so reiterate the options to everyone and work with them as things move forward. If more office working is something your charity wants, discuss this with cautious employees and try to find ways to keep them at ease back in the office. Don't forget,

emails, phone calls and video are still effective ways of communication.

## 3. Keep up the support

For many, the events of the last 18 months have necessitated a bigger workplace support system than ever before, and this shouldn't cease because 'normal' is returning. Try and remain approachable, available and encourage team members to talk to someone if they're having problems. Support for anyone struggling should be easily signposted on employee portals, through emails and in offices. Make it clear that despite restrictions lifting, the support systems put in place won't also be taken away.

## 4. Eyes wide open

As much as people have been encouraged to talk and seek support from peers, others are reluctant and end up suffering in silence. Not everyone will show obvious signs of a mental health problem and it's important not to make assumptions. Some possible signs include appearing tired, anxious or withdrawn; increase in sickness absence or being late to work; changes in the standard of their work or focus on tasks; being less

interested in tasks they previously enjoyed, or changes in usual behaviour around work peers.

It's harder to spot these signs if employees are working from home. It's important to regularly ask your staff how they're doing and create an environment where they feel able to be open and honest about how they're feeling.

If you believe a team member may be experiencing poor mental health, you should, if appropriate, arrange a conversation as soon as possible; make sure you talk to them in private; be flexible about when and where; approach the conversation in a positive and supportive way.

## 5. Stay flexible

Flexible working has become the saving grace for many charities over the past 18 months, and it shouldn't be forgotten. Although some might be itching to get back to the office, others might prefer to work from home part of the time. Luckily, many charities have acknowledged this and have set up arrangements, but keep in mind that things might have to remain flexible. It could be the case that an employee wants to come in two or three days a week, but a childcare provider comes down with Covid, or has been told to



isolate. There's a multitude of reasons to keep flexible working, so don't let those reasons become forgotten in the rush for normality.

#### **6. Wellbeing ambassadors**

It's not unheard of for charities, and other businesses, to have dedicated members of staff to look after employee wellbeing. These are often staff who are trained in mental health first aid, can look for the signs in someone struggling or even just be a listening ear. Often called 'wellbeing ambassadors', they should be signposted across the charity, are able to deal with situations confidentially and with safeguarding in mind. With wellbeing and employee mental health becoming a bigger priority than ever, having dedicated members of staff is something a charity can do to show it cares.

#### **7. Step back**

The reality is, the Covid-19 pandemic isn't over and it's likely it

won't be until 2022 at the minimum, which is both scary and nerve-racking for everyone. But fear can narrow our field of vision, making it harder to see the bigger picture of available options, including any positive possibilities in front of us. To deal with this, acknowledge the anxieties colleagues may be feeling and take time to explore options and find a positive outcome in the current situation.

#### **8. Not all work and no play**

When working from home, the lines between work and rest can easily be blurred. It's not as easy to switch off when you can answer an email here, or finish typing up a project there. Encourage employees to take frequent screen breaks, go for a walk and switch off emails at the end of the day. Try and encourage them to establish boundaries between working and home life as burnout, which became more common during the pandemic, will help no one in the long run. Encourage screen breaks and time away from social media.

#### **9. Team work makes the dream work**

It's easy to remember when working alone at home that you are part of a team, so employees must be feeling the same. If restrictions and personal feelings allow, try and encourage team-building activities – even if it is just a lunch, a trip to the pub, or a virtual equivalent such as a group Zoom chat; a quiz or equivalent. Remind people they are not alone when dealing with workplace challenges and encourage them to talk through these with others (virtually) surrounding them.

#### **10. Don't forget self-care**

With everything happening, you may find that you need advice and support for your own mental health so don't let it be put on the back-burner. Following the advice to other employees, it may be helpful to talk things through with someone who can support you and take advantage of some of the advice signposted in your own organization. Become an example others can follow. ■

ADVERTORIAL

# Digital Futures: Is your charity prepared for a digital transformation?

**Many charities are reacting to the pandemic by ramping up their use of digital. But what does a digital transformation really mean and how can charities benefit from it?**

WRITTEN BY SARAH LOWNEY, DIRECTOR OF PROFESSIONAL SERVICES, BLACKBAUD EUROPE



**E**arlier this year Blackbaud surveyed over 800 non-profit organisations, asking questions on personal well-being, responses to COVID-19, and what's coming next for charities.

The Future of Work Report 2021 uncovered some interesting findings on the current state of the sector – and there is a lot to be positive about – for example 87% said their employer had adapted well to the pandemic, and 80% said they enjoyed working from home and would like to continue to do it more

often. The report also discovered, perhaps unsurprisingly, that technology plays a huge role in future plans for many charities; 87% of respondents said that tech has helped them to work more efficiently during the pandemic, 64% of charities intended to invest more in tech, and 42% said they wanted to begin a digital transformation project.

We decided to take a closer look into exactly what this means in our new eBook, *Digital Futures: A Non-Profit Deep Dive on Digital Transformation and Change Management*.

## What is digital transformation?

It's the phrase on everyone's lips right now – but what exactly is Digital Transformation? What are other charities doing, and what can your organisation do to get it right?

'Going digital' isn't just about zoom meetings, virtual events and moving to the cloud – it's about all that and more. It's a complete transformation for your organisation, encompassing people and technology.

Digital Futures looks more closely

at what it means to start a digital transformation project and shares the 'going digital' stories and expert advice from seven voices working in the UK charity sector.

## Charity stories

There are so many aspects involved in digital transformation and charities are finding themselves at different stages along the digital journey. This new eBook hears from non-profits to explain what digital transformation means to them:

- Lorna Barker from the Jinja Educational Trust discusses how her team is at the early stages of exploring a transformation, and the steps they have taken so far
- Lou Scott, head of fundraising at Grief Encounter, shares their story of turning to virtual event fundraising and how they found a balance between going digital and maintaining strong personal relationships with supporters
- Jonathan Doonan from Queen's University Belfast describes why his organisation moved their CRM



system to the Cloud and how they handled the process.

#### **Expert advice**

Digital Futures also includes some great advice from digital experts in the sector:

- Zoe Amar, director of Zoe Amar Digital, shares the results of the Charity Digital Skills Report 2021,
- Maddie Stark, Digital Development Worker from SCVO, gives her tips on getting digital transformation right for your organisation,
- Emily Casson, Digital Marketing

Manager at Cats Protection, advises how to best manage a remote team, and

- Harry Richardson, HR Business Partner at Blackbaud, explains how to guide your organisation through the culture change brought about by digital transformation.

You can download the eBook and read for free on the Blackbaud Resource Hub by scanning the QR code to the right, or by following this link:

[www.blackbaud.co.uk/industry-insights/resources/digital-futures](http://www.blackbaud.co.uk/industry-insights/resources/digital-futures) ■



**blackbaud**™





# charitytimes

## What is the Charity Times Leadership Network?

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

### What does membership include?

Premium membership to the network includes the following:

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

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

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

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

### Why should I join?

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

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

## ROUND-UP

# Funding opportunities available now

A round-up of some of the latest funding opportunities up for grabs

WRITTEN BY JOE LEPPER

**O**ur round-up of the most recent funding opportunities for charities has been recently updated to include the latest list of grants, investment and awards available to you now. This includes new funding for community ownership projects as well as small grants for arts and heritage organisations and social investment

for charities in Scotland.

The new update comes as public funding for civil society is set to become even more scarce amid Covid-19 recovery this year.

Earlier this year New Philanthropy Capital (NPC) warned that charities are “unlikely to receive” much of a £5.17bn block of government funding aimed at “levelling up” the

UK to tackle geographic inequalities.

Nevertheless, there are still funding opportunities to be found, from smaller government pots of cash as well as from grants from trusts and foundations. Trusts in particular are increasingly keen to support charities that are looking to bolster their digital capabilities, as well as support the mental health needs and emotional wellbeing of beneficiaries hit hardest by the current health crisis.

## Power Up Scotland

Big Issue Invest has opened applications for £500,000 worth of investment for 12 social ventures through its Power Up Scotland initiative. Its latest funding round of investment is open for applications until 17 September.

Scottish charities, social enterprises as well as businesses creating social value can apply. Funding can be used for buying equipment, hiring talent or progressing with business development plans, said Big Issue Invest.

“The programme has been designed for early-stage social ventures, regardless of company structure - social enterprises, charities, and private enterprises are all welcome, with social value creation being the key criterion. The expectation is that many applicants



# Funding

will be accessing finance for the first time,” it adds.

## Community Ownership Fund

The government has announced details of the £150m Community Ownership Fund to enable communities to take ownership of local amenities at risk of closing.

Priority for the first round is to invest in projects that are ready to access capital funding and complete projects within six months. The deadline for first round bids was August 13, but a second bidding round is set to open in December, with a third in May 2022.

Typical projects to be funded include:

- sporting and leisure facilities
- cinemas and theatres
- music venues
- museums
- galleries
- parks
- pubs
- post office buildings
- shops

## Idlewild Trust small grants scheme

The Idlewild Trust has re-opened applications for two of its funding streams.

The first focuses on grants to arts organisations to nurture professionals at the start of their career in the arts. The other involves grants to support the conservation of historic or artistically important objects and works of arts in museums, galleries, historic buildings and places of worship.

The deadline for both funding streams is 14 September, with decisions on applications to be given by the end of November. The Idlewild Trust funds around 40 to 50 organisations a year and awarded

£128,055 in 2020 in 33 grants. The average grant last year was £3,880.

## Racial Equity Fund

Lloyds Bank Foundation has launched a Racial Equity Fund for small charities that are led by and support Black, Asian and ethnic minority communities.

The Fund launched on April 20. Two-year unrestricted grants of £50,000 as well as development support is being made available. The funding is open all year round to give charities greater flexibility to apply at a time that suits them, according to the Foundation.

More than half of the trustee boards of those that apply must self-identify as Black, Asian or minority ethnic. The must also have an annual income of between £25,000 and £1m and a strong track record of supporting minority communities.

The Covid-19 pandemic shining “a light on existing deep-rooted and systemic inequalities in our society” has been a key factor in the Fund launching, according to the Foundation.

“These inequalities are present across the complex social issues the Foundation funds such as homelessness, domestic abuse, mental ill health and the criminal justice system, with Black, Asian and minority ethnic communities less well served by mainstream provision, and disproportionately affected,” the Foundation said.

## The 7 Stars Foundation

The 7 Stars Foundation offers funding to projects that support some of the UK’s most challenged young people. This includes young victims of abuse, addiction or those who are young carers.

It offers direct and project grants.

Other funding streams include its Shine Bright funding for regional charities during Covid-19 pandemic. This enables charities to bolster their mental health support for young people.

Another is its Star Start funding initiative to fund breakfast clubs in schools, with a focus in 2021 on those in London. The latest application submission deadline is at the end of October.

## Revitalising Trusts Programme

This programme is run by UK Community Foundations in partnership with the Charity Commission and the Department for Digital, Culture, Media and Sport to ensure dormant or inactive charitable trusts unlock unspent funding on good causes.

Even though many of these pots are small, collectively they can make a significant difference. The programme has been running since 2018 and has revitalised more than £30m of inactive funds in England. A Welsh version of the scheme launched earlier this year. This offers trusts the option to transfer funding to Community Foundation Wales to spend on local projects and good causes.

## Magic Little Grants

Applications are now open for this year’s Magic Little Grants grant giving scheme, which is being run by Localgiving and funded through funding partners from the People’s Postcode Lottery.

The focus is on directing micro grants to small charities. Being made available is 2,000 grants worth £500 for charities and community groups.

This year the fund is supporting groups and charities working to improve mental wellbeing,



community arts, outdoor spaces, participation in physical activity, green spaces and responding to climate emergency.

It is also looking to fund schemes that reduce the impact of poverty and support marginalised groups as well as promoting equality. The deadline for applications is 31 October, 2021.

### **National Lottery Community Fund (NLCF)**

The NLCF has a raft of funding opportunities available charities of all sizes which have an ongoing application deadline.

For smaller charities, funding of between £300 and £10,000 is made available through the National Lottery Awards for All funding streams, for England, Wales, Scotland and Northern Ireland.

Meanwhile its online Reaching Community England fund offers

larger grants of more than £10,000 for projects that last up to five years. These grants focus on projects working with the community.

Other funding streams include its People and Communities fund for up grants of up to £500,000 for projects in Northern Ireland.

Another is its Growing Great Ideas programme, which is offering minimum grants of £150,000 to projects that invest in supporting transformational and long-term change .

### **John Lyon's Charity**

Another major funder to offer a variety of funding initiatives to charities is John Lyon's Charity, which has a particular focus on projects that benefit children and young people.

Its funding includes the £22m Cultural Capital Fund, which aims to

avert charity closures amid Covid-19 recovery. This will initially support the arts and young people and will hand out funding over the next year. The Charity is particularly keen to support organisations working in collaboration, those replicating successful, initiatives and those at serious risk of closure.

"Our aim is to fund not just for the recovery but for the sustainability of the children and young people's sector," said John Lyon's Charity chief executive Lynne Guyton.

"We strongly believe that we need to take positive action now to safeguard our previous investment in the sector for future generations. Now is the proverbial rainy day".

Other grants include main, small and bursary funds. It also has a School Holiday Activity Fund and runs a Capacity Building small grants fund. ■



ADVERTORIAL

# Investing responsibly: From sinners to saints

**What are 'sin stocks' and how should charities seek to handle them?**

WRITTEN BY RICHARD MAITLAND, PARTNER, SARASIN & PARTNERS

A comprehensive Socially Responsible & Ethical Investment Policy (SREIP) that has been tailored to the needs of your charity should be viewed as an integral part of a wider Investment Policy Statement. This is no easy task and arbitrating between stakeholders' personal ethical beliefs and what is right for the charity can prove testing.

The Charity Commission's Guidance – which is currently under review – tells us that it is legally sound to adopt an ethical policy, even if it results in lower returns, but trustees must be able to justify it.

However, simple avoidance tactics shouldn't be where a modern SREIP

ends. This article considers avoidance and issues of governance and stewardship that will arguably have a greater long-term impact on investment performance and society in general.

There is no harm in starting by noting your charity has an overriding aim to avoid investment in companies which make products prohibited under international protocol, before establishing which legal investments conflict with your charity's objectives. Much will depend on your charity's specific causes and stakeholders.

The most common restriction we see is a zero tolerance for companies manufacturing tobacco products.

This is an easy exclusion for health-related charities, but is also justifiable and regularly accepted as the norm by many others outside the medical sphere. Traditionally described as the 'sin sectors', many trustees also seek to avoid investment in companies which manufacture alcohol and armaments or derive revenues from pornography and gambling. There are of course, grey areas: alcohol in moderation has been shown to be of benefit so where does one draw the line in terms of those who sell 'sin' products, as opposed to making them?

What is considered a 'sin' evolves: 30 years ago, some investors



avoided Japan as memories of war-time events lingered, while others took issue with companies with exposure to Burma, now Myanmar. More recently, 'payday lending' has become a contentious service, at the same time, many feel the tech giants are profiting while harming society. And how does one view companies with significant operation in countries like China, where human rights violations are clearly an issue?

Which brings us to the climate crisis: some trustees might want to consider long-term elements in their selection of stocks, ensuring that their assets are aligned with their long-term interests. Momentum is building for investment managers to withdraw funds from companies with 'carbon stranded assets' – energy resources that are likely to harm society if they are extracted and which many believe will be uneconomically viable in due course.

This last 'sin' however highlights the complexities of simple avoidance and negative screening strategies: is the true sinner the company extracting the fossil fuel or the one burning the fuel to create its products or provide its services? And whilst a tobacco company is arguably unnecessary for society, fossil fuels are still definitively needed by society as we transition to greener and more sustainable sources of energy. Is it right to cast out all extractors? Is it really responsible to sell our shares and bonds, leaving them owned by people who don't care? Is it intellectually or morally robust to avoid those who extract fossil fuels while profiting from those that use them inappropriately or inefficiently?

In summary, when considering policy, it is important for trustees to

understand the full implications. Some might be more restrictive than they first appear, while others that look simple at first might be more complex than first thought.

In most instances, the key to agreeing an appropriate exclusion policy will be to take a pragmatic stance, identifying products and practices most relevant to your organisation. A degree of 'proportionality' may also make sense: in addition to zero tolerance in a few areas that clearly conflict with core principles, most charities will look at the percentage of revenues derived from conflicting activities, perhaps avoiding those with more than 5% or 10% of their revenues in the 'sin' area.

In our experience, avoiding up to about 10% of global equity markets is not something that can be proven to impact performance of multi asset portfolios over the longer term. There might be a little more short-term volatility in both relative and absolute performance: historically, ethical investment policies have tended to fare a little worse in falling markets and rather better in rising ones. A study of the performance of multi asset Common Investment Funds over the past 5 and 10 years would support the view that manager selection is more important than the nuances of different ethical exclusions.

Finally, we would suggest that avoidance is actually the easy part! Investing responsibly goes beyond simply avoiding investment in specific companies. At least as much attention should be paid to how the companies you own behave and how your manager oversees and engages with management teams. In the long-term, good governance will likely have a more positive impact

on both society and investment performance, than worrying about the companies you whose shares you don't own and with whom you cannot engage.

Most investment managers are now signatories to the UN Principles for Responsible Investing. They should be able to demonstrate a clear process for embedding strong corporate governance and stewardship principles into their research.

Ultimately, a strong charity-focussed investment manager should be able to explain the impact of ethical screening on performance, while from a 'stewardship' perspective they should be proactive in updating you on the votes they have cast on your behalf and where they are engaging with companies to improve practices. The best will also show how they are engaging with government and industry bodies on critical matters like accounting standards.

In conclusion, it is an important part of a trustee's responsibilities to create an SREIP that matches their charity's objective by considering both that which needs to be avoided and how they will act as stewards for the assets they go on to own. An investment manager with strong responsible credentials should ensure this task is not overly onerous and in doing so, will ensure that the reputation of the charity is protected. ■

**SARASIN**  
& PARTNERS



# charitytimes **Jobs**

Charity Times is the leading management title for the charity and not-for-profit sector, with a combined readership of 140,000.



## **We can offer recruiters:**

- Vacancy advertised on our email newsletter, which reaches 21,000+ subscribers twice a week.
- Vacancy advertised on [www.charitytimes.com](http://www.charitytimes.com), the leading news portal for the charity sector.
- All listings include your branding and full details of your role.
- Listings will also run on our sister email newsletter to the Better Society Network, sent to 10,000 readers free of charge.

Vacancies start at £295 for charities and £395 for corporates



## **For further details please contact**

[linda.libetta@charitytimes.com](mailto:linda.libetta@charitytimes.com)

or 020 7562 2431



## ANALYSIS

# The art of winning

**Do some discretionary managers consistently outperform? If so, how do they do it?**

WRITTEN BY GRAHAM HARRISON, MANAGING DIRECTOR, ARC

The holy grail for most charity investors is to select an investment manager who consistently meets their investment objectives and out-performs their peers over time. Though investment literature is peppered with warnings that past performance is no guide to future performance, the belief remains that decisions to appoint or remove a manager should be based, at least in part, on their performance track record. So, are there discretionary managers that have persistently outperformed? And if there are, can a common explanation for such outperformance be identified?

To examine the question, we have analysed the ARC Charity Indices Universe. If Fama's observation is correct, and there is no persistence of outperformance, then we should expect no statistical relationship (ie correlation) between a manager's positioning relative to peers from one period to the next.

A simple test is to examine performance over the last six years and compare manager rankings over the last three years and the first three years. Perhaps surprisingly around 70% of managers currently in the top quartile were also top quartile three years back. Thus, it appears that Fama is wrong; there is evidence of persistence in out-performance.

To expand the analysis, consider risk-adjusted performance over the last decade by charity managers

| Proportion of Time in Quartile / %<br>Rolling 3 Year Sharpe Ratio over the past 7 years |     |     |     |     |
|---|-----|-----|-----|-----|
| Current Quartile  | 1st | 2nd | 3rd | 4th |
| 1st   | 67  | 15  | 12  | 6   |
| 2nd   | 13  | 37  | 19  | 31  |
| 3rd   | 16  | 19  | 33  | 32  |
| 4th   | 12  | 25  | 33  | 30  |

running Steady Growth portfolios. The table below plots the percentage of the time those managers that have delivered top quartile performance over the last three years have spent in the top quartile over the previous seven years. If Fama is right, each box should be 25%.

As the highlighted cell shows; current top quartile managers have spent 67% of the time in the top quartile over the previous seven years; a significantly higher proportion than would be expected if there was no persistence.

The data above appears to show strong evidence of persistent out-performance. So, is Fama wrong? Looking back at markets over the past decade reveals that the factors leading to out-performance have been quite stable. That implies outperformance has been driven by longer term asset allocation decisions rather than tactical asset allocation decisions or superior stock selection.

Do discretionary investment managers exist that have delivered persistent outperformance over the



last decade or more? Yes! The explanation is most likely to involve strategic asset allocation choices rather than tactical trades and stock selection. However, regimes do not last forever and when change comes it can be very rapid. Such inflection points usually result in an upheaval in manager rankings.

Such an inflection point may be approaching. The post GFC themes of financial repression and digital economy may well be replaced by climate change; inflation; protectionism; or other factors. What is certain is that, whilst selecting an investment manager remains as much art as science, investors ignore understanding performance track records at their peril.■



## INVESTMENT

| Multi-Asset Funds                           | Investment Manager | Fund Size (£m) | Cash % | Bond % | Equities |        |
|---|--------------------|----------------|--------|--------|----------|--------|
|   |                    |                |        |        | UK %     | Intl % |
| Barclays Charity Fund                       | Barclays           | 254.8          | 3.8    | 18.2   | 23.2     | 46.6   |
| Armed Forces Charities Growth & Income Fund | BlackRock          | 419.1          | -0.2   | 13.6   | 26.1     | 40.7   |
| Catholic Charities Growth & Income Fund     | BlackRock          | 179.8          | 7.6    | 7.6    | 28.6     | 35.2   |
| Charities Growth & Income Fund              | BlackRock          | 186.9          | 4.8    | 11.4   | 27.6     | 41.6   |
| Charity Multi-Asset Fund                    | Cazenove           | 638.4          | 3.2    | 8.5    | 9.6      | 61.5   |
| Responsible Charity Multi-Asset Fund        | Cazenove           | 476.9          | 3.3    | 8.8    | 0        | 72.8   |
| CBF Church of England Investment Fund       | CCLA               | 1,949.70       | 4.6    | 0      | 11.3     | 66.3   |
| COIF Charities Ethical Investment Fund      | CCLA               | 1,538.10       | 4.9    | 0      | 9.9      | 68.3   |
| COIF Charities Investment Fund              | CCLA               | 3,790.40       | 4.9    | 0      | 10.2     | 68     |
| Amity Balanced Fund for Charities           | EdenTree           | 24.1           | 2.4    | 23.7   | 52       | 21.9   |
| M&G Charity Multi-Asset Fund                | M&G                | 194            | 2.1    | 18.9   | 44       | 34.8   |
| Newton Growth & Income Fund for Charities   | Newton             | 824.8          | 5      | 12.6   | 39.8     | 42.7   |
| Newton SRI Fund for Charities               | Newton             | 115.3          | 1.9    | 11     | 32.9     | 52.5   |
| Newton Sustainable Growth & Income Fund     | Newton             | 73             | 4.9    | 10.1   | 20.2     | 62.3   |
| Active Income and Growth Fund for Charities | Rathbones          | 236            | 3.8    | 16.2   | 25.7     | 38.6   |
| Core Investment Fund for Charities          | Rathbones          | 138.8          | 2.1    | 7.6    | 35.1     | 40.1   |
| Charity Assets Trust                        | Ruffer             | 158.8          | 10.4   | 38.3   | 15.3     | 23.5   |
| Sarasin Climate Active Endowments Fund      | Sarasin & Partners | 432.1          | 3.9    | 10.1   | 19.8     | 53.8   |
| Sarasin Endowments Fund2                    | Sarasin & Partners | 2,259.00       | 5.2    | 10     | 19.8     | 52.8   |
| Sarasin Income & Reserves Fund2             | Sarasin & Partners | 173.1          | 5.6    | 60.3   | 10.6     | 13.5   |
| Waverton Charity Growth & Income Fund       | Waverton           | 35.3           | 4.8    | 10.4   | 13.5     | 56.5   |

| Peer Group Indices                    |     |  |      |      |      |      |
|---------------------------------------|-----|--|------|------|------|------|
| Sterling Cautious Charity Index       | ARC |  | 20.9 | 46.2 | 5.6  | 9.7  |
| Sterling Balanced Asset Charity Index | ARC |  | 9.5  | 29.5 | 21.3 | 25.3 |
| Sterling Steady Growth Charity Index  | ARC |  | 5.9  | 20.1 | 32.2 | 35   |
| Sterling Equity Risk Charity Index    | ARC |  | 0    | 13.2 | 43.9 | 38.5 |

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

## INVESTMENT

| Prop erty % | Other % | Last Quarter | Last 12 Months | YTD 2020 | Last 3 Years | Last 5 Years | Last 10 Years |
|-------------|---------|--------------|----------------|----------|--------------|--------------|---------------|
| 4.7         | 3.5     | 5.8          | 18.1           | 7.7      | 21.7         | 54.2         | -             |
| 7.1         | 12.7    | 5.9          | 18.1           | 7.1      | 28.9         | 58.8         | 122.2         |
| 7.8         | 13.2    | 4.9          | 16.6           | 5.8      | 24.9         | 58.8         | 113.8         |
| 3.4         | 11.2    | 5            | 16             | 6        | -            | -            | -             |
| 6.6         | 10.6    | 5.5          | 16.5           | 6.2      | 21.3         | 46.4         | 88.4          |
| 4           | 11.1    | 5.8          | 19.4           | 6.9      | -            | -            | -             |
| 3.8         | 14      | 7.8          | 18.1           | 8.2      | 42.9         | 84.8         | 184.1         |
| 4.3         | 12.6    | 7.9          | 16.8           | 7.9      | 40.2         | 78.8         | 167.5         |
| 4           | 12.9    | 8.1          | 18.2           | 8.4      | 40.7         | 79.1         | 172           |
| 0           | 0       | 2.4          | 20.3           | 8        | 16.7         | 34.7         | 84.7          |
| 0.2         | 0       | 4.5          | 19.2           | 8.4      | -            | -            | -             |
| 0           | 0       | 5.6          | 17.5           | 8.8      | 25.5         | 54.2         | 150.2         |
| 0           | 1.8     | 3.7          | 18.5           | 6.9      | 29.3         | 62.7         | 125.2         |
| 0           | 2.4     | 4.7          | 14             | 6.7      | 27.6         | 55           | -             |
| 6.1         | 9.5     | 4            | 15.5           | 6.1      | 19.2         | 51.2         | -             |
| 5.4         | 9.7     | 5.3          | 21.5           | 8.4      | 26.4         | -            | -             |
| 0           | 12.5    | 0            | 15.6           | 8.5      | 23.2         | 34.2         |               |
| 3.1         | 9.3     | 3.6          | 14.4           | 4.3      | 32.9         | -            | -             |
| 3.1         | 9       | 3.8          | 15             | 4.7      | 31.4         | 56.9         | 116           |
| 0           | 9.9     | 2.3          | 4.5            | -0.3     | 16.6         | 24.2         | 67.5          |
| 3.8         | 11.1    | 5.1          | 13.1           | 5.2      | -            | -            | -             |

|     |      |     |      |     |      |      |       |
|-----|------|-----|------|-----|------|------|-------|
| 3   | 14.6 | 2.5 | 6.1  | 1.8 | 10.6 | 17.1 | 43    |
| 2.6 | 11.9 | 4.3 | 12.9 | 5.1 | 16.7 | 33.8 | 73.4  |
| 1.5 | 5.3  | 5   | 16.6 | 6.8 | 20.5 | 44.7 | 94.5  |
| 0.9 | 3.5  | 5.6 | 20.5 | 8.5 | 21.8 | 50.8 | 105.9 |

|     |      |      |      |      |       |
|-----|------|------|------|------|-------|
| 5.6 | 17.9 | 10.8 | 3    | 30.7 | 70.1  |
| 7.6 | 23.6 | 11.8 | 45.1 | 94.8 | 219.9 |
| 1.7 | -6.3 | -5.7 | 9    | 9.9  | 55.8  |
| 1.8 | 1.6  | -3.3 | 16.5 | 23.8 | 81.1  |
| 7.2 | 22.1 | 10.4 | 0.6  | 19.1 | 71.7  |
| 0   | 0    | 0    | 1.4  | 2.1  | 4.6   |

Source / Asset Risk Consultants

## Key

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

# Suppliers Directory

To advertise in Suppliers Directory contact Linda Libetta +44 (0)20 7562 2431

## ASSOCIATIONS



### ACEVO

71-75 Shelton Street  
London  
WC2H 9JQ

T: 020 7014 4600  
E: [info@acevo.org.uk](mailto:info@acevo.org.uk)  
W: [www.acevo.org.uk](http://www.acevo.org.uk)  
Twitter: @ACEVO

The Association of Chief Executives of Voluntary Organisations (ACEVO) supports members by providing access to:

- Third sector leadership and governance resources to support boards and senior management teams
- Information, publications and reports on key third sector issues
- Conferences, courses and networking opportunities to enhance skills and build knowledge
- Dedicated helplines and support services such as CEO in Crisis - a service for third sector CEOs facing disputes with their board.

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



### Charity Finance Group

15-18 White Lion Street  
London  
N1 9PG

T: 0845 345 3192  
F: 0845 345 3193

Company Registration No. 3182826

Charity Registration No. 1054914

Charity Finance Group (CFG) is the charity that champions best practice in finance management in the charity and voluntary sector. Our vision is of a financially confident, dynamic and trustworthy charity sector. With this aim in sight, CFG delivers services to its charity members and the sector at large which enable those with financial responsibility to develop and adopt best practice.

With more than 1,300 member charities, managing over £19.3 billion, we are uniquely placed to challenge regulation which threatens the effective use of charity funds, drive efficiency and help charities to make the most out of their money.

For more information please visit [www.cfg.org.uk](http://www.cfg.org.uk)

## BANKING



### Triodos Bank

Deanery Road  
Bristol BS1 5AS

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

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

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

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

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

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

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



### Unity Trust Bank plc

Nine Brindleyplace  
Birmingham  
B1 2HB

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

Looking for a bank that **understands** your charity?

Unity Trust Bank was rated No.1 for Sector Knowledge in an independent charity banking survey (2014) and was also rated top for Relationship Managers, Fees and Charges and Meeting Expectations.

Currently, around 7,000 charities bank with Unity and over 50% of our lending last year was to charitable organisations.

Established in 1984, positive social impact and financial sustainability were part of our founding principles. Today, more than 30 years later, they remain core to what we stand for.

If you're a charity, look no further – **we're on the same page.**

## Advertise your services directly to our subscribers using our Suppliers Directory

If you are a supplier to the charity and not-for-profit sector and want to maintain consistent visibility amongst potential customers then why not include your company within the suppliers section of Charity Times. Your entry would be listed for 12 months (print & online) and includes company logo, contact details and company description/products.

Charity decision makers use this section to find suitable expert suppliers. So call us on 0207 562 2431 with your details and we will create a listing to ensure that your company is visible within this valuable resource.

Call us on **0207 562 2431**

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

# Suppliers Directory

To advertise in Suppliers Directory contact Linda Libetta +44 (0)20 7562 2431

## FUNDING



### PayPal Giving Fund

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

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

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

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

## INSURANCE



### Unity Insurance Services

Suite 8 The Quadrant  
60 Marlborough Road  
Lancing Business Park  
Lancing, West Sussex  
BN15 8UW

T: 0345 040 7702  
F: 0345 040 7705

E: [info@unityinsuranceservices.co.uk](mailto:info@unityinsuranceservices.co.uk)  
W: [www.unityinsuranceservices.co.uk/charity-insurance](http://www.unityinsuranceservices.co.uk/charity-insurance)

### Insurance for charities with 100% of our profits returned to charity.

As a charity owned insurance broker, Unity Insurance Services has a unique insight into your sector. For over 80 years, we have been protecting the people, property, liabilities and activities of charities.

We view each charity as unique so we always aim to provide solutions that fit your exacting needs. That's why we will spend the time to understand in detail your activities and risks to obtain the best possible cover at the best possible price.

Visit our website or telephone us to find out more.

## INVESTMENT MANAGEMENT



### Charles Stanley & Co. Limited

55 Bishopsgate London EC2N 3AS

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

E: [nicholas.muston@charles-stanley.co.uk](mailto:nicholas.muston@charles-stanley.co.uk)  
T: 020 7149 6610

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

E: [robert.winterton@charles-stanley.co.uk](mailto:robert.winterton@charles-stanley.co.uk)  
T: 020 7149 6265

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

### A personal service shaped around you

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

\*as at 31/12/17

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



### EdenTree Investment Management Ltd

24 Monument Street  
London  
EC3R 8AJ

Philip Baker  
Head of Institutional Business Development  
T: 0800 032 3778  
E: [charities@edentreeim.com](mailto:charities@edentreeim.com)  
W: [edentreeim.com](http://edentreeim.com)

### Profit with principles

That is what we aim to deliver. We believe that a company's business activity, its environmental and community impact and the way it interacts with its stakeholders can all positively contribute to returns. This is why these factors are integral to our responsible investment process and why EdenTree Investment Management has won numerous awards for its performance.

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

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



### Epworth Investment Management Limited

9 Bonhill Street, London  
EC2A 4PE

Mark O'Connor  
Head of Business Development  
T: 020 7496 3639  
E: [mark.oconnor@epworthinvestment.co.uk](mailto:mark.oconnor@epworthinvestment.co.uk)

### Christian Ethical Investment – for Churches and Charities

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

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

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

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



# Suppliers Directory

To advertise in Suppliers Directory contact Linda Libetta +44 (0)20 7562 2431

## INVESTMENT MANAGEMENT



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

PO Box 9038, Chelmsford CM99 2XF

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

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

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

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

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

# NEWTON

Investment  
Management

### Newton Investment Management

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

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

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

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

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

**Your capital may be at risk. The value of investments and the income from them can fall as well as rise and investors may not get back the original amount invested. This is a financial promotion.**



QUILTER CHEVIOT  
INVESTMENT MANAGEMENT

### Quilter Cheviot

Contact: Charles Mesquita

One Kingsway  
London  
WC2B 6AN

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

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

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

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

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

Rathbones  
Look forward

### Rathbone Investment Management

8 Finsbury Circus, London EC2M 7AZ

For further information please contact  
Natalie Yapp:

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

*Rathbone Investment Management Limited is authorised and regulated by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority*

Rathbones welcomes charities of all shapes and sizes. We like to work in partnership with our charity clients which means you will have direct access to the person managing your charity's investments, resulting in a portfolio that accurately meets your needs and is as individual as your charity.

#### Key facts

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

All figures as at 31 December 2020

At Ruffer our offering for charities include:

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

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

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

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



### Ruffer LLP

80 Victoria Street  
London  
SW1E 5JL

For more information contact:  
Ajay Johal - Investment Manager

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

# Suppliers Directory

To advertise in Suppliers Directory contact Linda Libetta +44 (0)20 7562 2431

## INVESTMENT MANAGEMENT



### Sarasin & Partners LLP

Juxon House  
100 St Paul's Churchyard  
London EC4M 8BU

Contact: John Handford

T: 020 7038 7268  
F: 020 7038 6864  
E: [john.handford@sarasin.co.uk](mailto:john.handford@sarasin.co.uk)  
W: [www.sarasinandpartners.com](http://www.sarasinandpartners.com)

Sarasin & Partners manages approximately 433 charities\* with over £6.6 billion in charitable funds\*, representing over 48% of the firm's total Assets under Management. We also manage investments for UK private clients, pension funds, and other institutions with total funds under management of £13.9 billion\* (\*as at 30.06.2019).

Our particular expertise is determining and reviewing the appropriate mix of asset classes suitable to meet the circumstances of each charity.

We are well known for our commitment to education having trained over 5,000 trustees. The reference for this training is our Compendium of Investment.

*Sarasin & Partners LLP is a limited liability partnership incorporated in England and Wales with registered number OC329859 and is authorised and regulated by the Financial Conduct Authority.*



### Smith & Williamson

25 Moorgate  
London  
EC2R 6AY

Contact: Sharon Hanshaw  
T: 020 7131 8214  
w: [www.sandwcharities.com](http://www.sandwcharities.com)

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

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



### UBS

5 Broadgate  
London EC2M 2AN

Tom Duperex- Head of Charities  
E: [tom.duperex@ubs.com](mailto:tom.duperex@ubs.com)  
T: +44 207 567 0241

W: [www.ubs.com/charities-uk](http://www.ubs.com/charities-uk)

### Charity focused, performance driven

Access all the investment insight and guidance your charity needs through our dedicated team of experts, structured and ethical investment process and worldleading research.

The value of your investments may fall as well as rise as a result of market and currency fluctuations. You may not get back the amount you invested.

Authorised and regulated by Financial Market Supervisory Authority in Switzerland. In the United Kingdom, UBS AG is authorised by the Prudential Regulation Authority and is subject to regulation by the Financial Conduct Authority and limited regulation by the Prudential Regulation Authority. Details about the extent of our regulation by the Prudential Regulation Authority are available from us on request.



### Waverton Investment Management

16 Babmaes Street  
London  
SW1Y 6AH

Contact: Isobel Fraser  
T: 020 7484 7485  
E: [charities@waverton.co.uk](mailto:charities@waverton.co.uk)

W: [www.waverton.co.uk/charities](http://www.waverton.co.uk/charities)

### High quality investment solutions for charities

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

#### Waverton offers:

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

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

## PROMOTIONAL MERCHANDISING



### 4imprint

5 Ball Green  
Manchester  
M32 0QT

T: 0800 055 6196  
E: [sales@4imprint.co.uk](mailto:sales@4imprint.co.uk)  
W: [www.4imprint.co.uk](http://www.4imprint.co.uk)

4imprint make ordering printed products quick and simple! And what's more we back up our magnificent product range with our water-tight 'no quibble' guarantees!

It's simple. We guarantee you'll be 100% satisfied with your order, you won't find a lower price elsewhere and that if your event is missed because we don't dispatch in time then it'll be FREE!

We're here to guide you every step of the way! Ordering online is simple and secure; but if online isn't your thing, please drop us an email [sales@4imprint.co.uk](mailto:sales@4imprint.co.uk) or call us on 0800 055 6196 and we'll get right back to you with the information you need.

## M&G CHARITY MULTI ASSET FUND

# FOR THOSE WITH MORE TO CARE FOR

LET'S CREATE

We understand that Charities and Foundations must balance their income requirements with the need to grow endowments and reserves over the long term. That's why M&G Charity Multi Asset Fund offers a diversified, multi-asset portfolio, built to target both long-term returns, and a strong regular income stream where this is required.

For information, please email [charities@mandg.co.uk](mailto:charities@mandg.co.uk)

The value and income from a fund's assets will go down as well as up. This will cause the value of your investment to fall as well as rise and you may get back less than you originally invested.

