

charitytimes

September 2015

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Corporate partnerships

Finding the key to a successful corporate partnership

Digital engagement:

The personal touch

Effective engagement in an increasingly digital world

Legal comment:

Kids Company

Two sides of the coin and the changing landscape of the charity sector

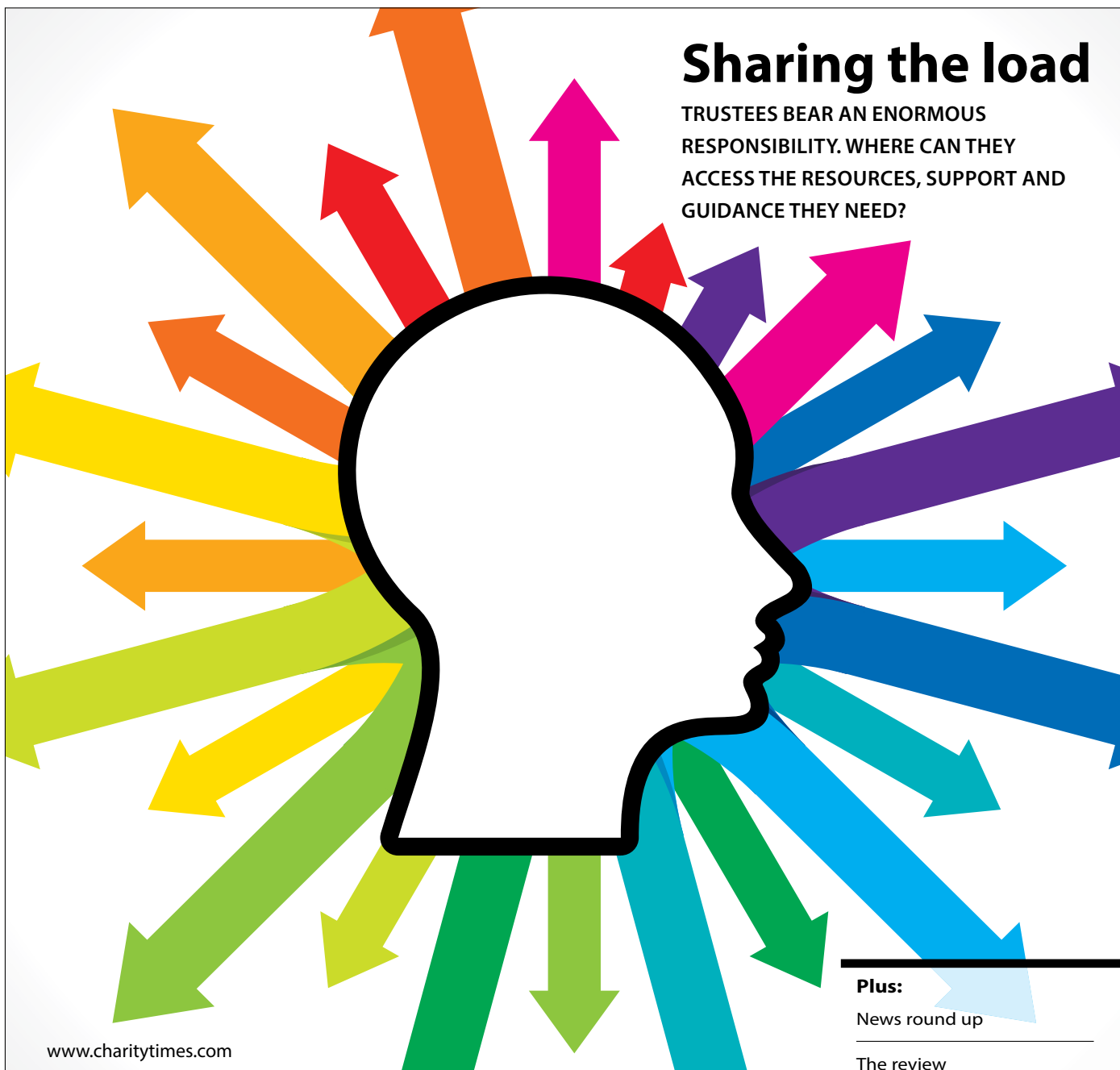
Charity Times Awards 2015:

Shortlist

The charities in the running at this year's Charity Times Awards

Sharing the load

TRUSTEES BEAR AN ENORMOUS RESPONSIBILITY. WHERE CAN THEY ACCESS THE RESOURCES, SUPPORT AND GUIDANCE THEY NEED?



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CHARITY CHATTER

Commentary on the issues impacting the sector

Plus:

News round up

The review

Sector columns

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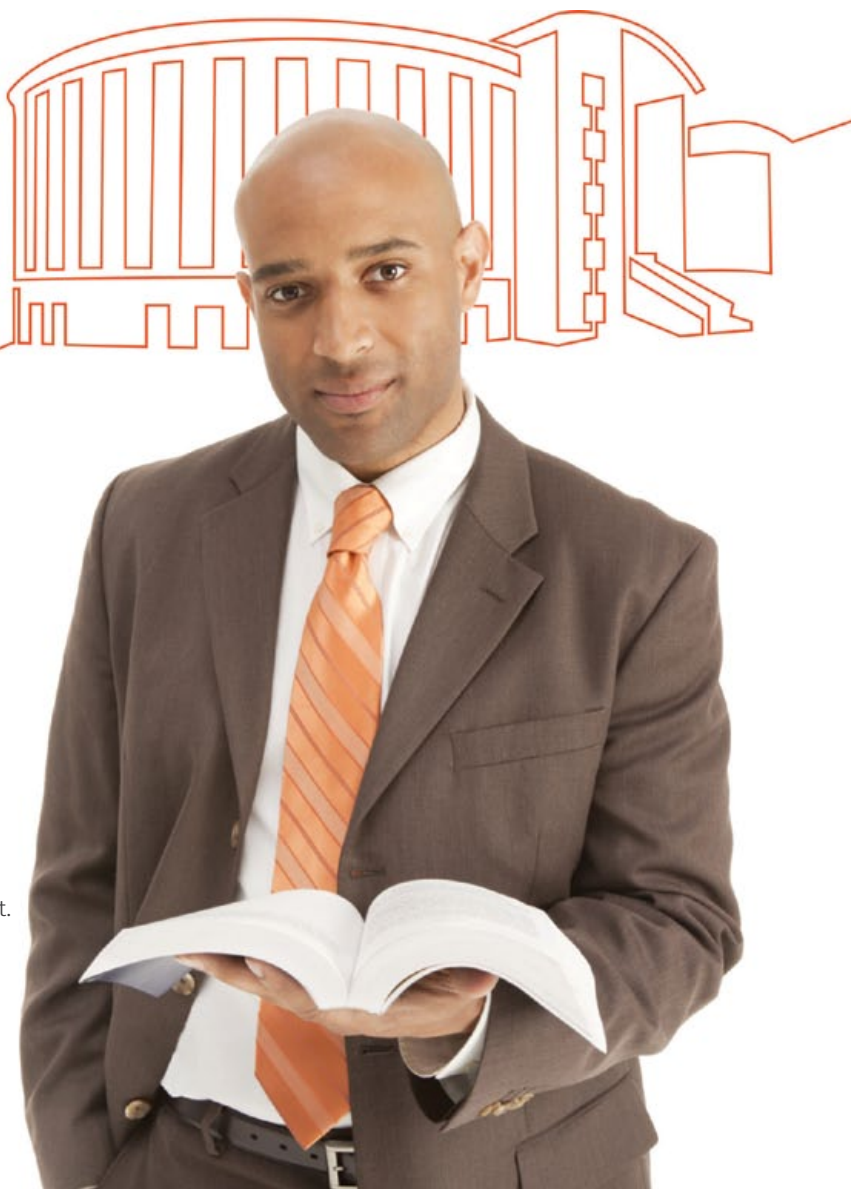
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charitytimes

Help is at hand

When the last edition of Charity Times went to press the sector was in the firing line over fundraising practices. That issue has not gone away, and is sure to receive a new lease of life soon enough. A review of the regulatory framework around fundraising is due to report by the end of September.

But a new wave of controversy has washed over the sector in the wake of the closure of Kids Company. The blame game has been played hard by parties on all sides, and frankly I am not inclined to pick sides or add to the white noise around the issue.

Regardless of what the various post-mortems reveal by way of the influences on the charity's closure, issues of leadership and governance will doubtless be to the fore.

The sector's profile is high at the moment, and not for all the right reasons. It also happens to be an exceedingly difficult time to run a charity, with money tight and demand for services high. A review of the financial sustainability of the sector chaired by NCVO chief executive Sir Stuart Etherington found charities have not shared in the benefits of the economic recovery, with cuts to back-office and management capacity only adding to the challenge.

At the community level organisations fear their funding position will worsen over the next 12 months, as revealed by NAVCA's most recent quarterly member survey.

So in this issue we dedicate our cover story (p22) to where trustees can turn for help. Fortunately, there is no shortage of help at hand for the trustee who wants to up skill. Indeed, the bigger challenge could be dealing with information overload rather than struggling to secure help.

And, to close on a positive note, this issue also features the shortlist of entrants to the Charity Times Awards 2015. These candidates stood out from what was an exceptionally strong selection of entries this year.

A reminder, if any was needed, that this sector in fact makes an indispensable contribution to our society – one well worth celebrating.



A handwritten signature in dark ink, appearing to be 'Matt Ritchie'.

Matt Ritchie, Editor



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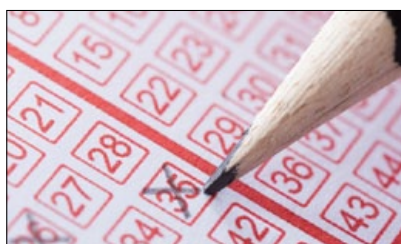
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Charity Times Awards

25 Shortlist

The charities in the running at the Charity Times Awards 2015

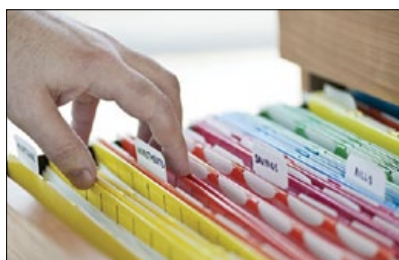


LONDON-BASED CHARITY KIDS COMPANY closed due to a lack of funding in August. The charity, that supported vulnerable children across London, Bristol and Liverpool, had been subject to a range of allegations around financial mismanagement. Kids Company had filed a petition for winding up under insolvency legislation at time of publishing.

APPLICATIONS ARE NOW OPEN FOR THE £2M PEOPLE'S POSTCODE LOTTERY DREAM FUND 2016. The largest ever Dream Fund to date will be awarded to charitable organisations to deliver their 'dream' projects in one or more areas of the UK in 2016 to 2018. First prize is £1m, alongside two awards of £500,000. Applications from projects that fit with one or more of the Postcode Dream Trust's charitable purposes opened in August and close on 22 September. Purposes include community development, environmental protection, health, human rights, participation in sports, and prevention of poverty. The winners will be announced in January.

TRUSTEES FOR A CHARITY SUPPORTING DEAF PEOPLE made a convincing case for payments to trustees being in the organisation's best interest, the regulator has found, despite such a power being absent from the charity's governing document. Deafinitions' accounts for 2013 showed three of its four trustees were benefiting privately from the charity, the Charity Commission said in a case report. The regulator said

Deafinitions' governing document only provided for payments to trustees with the commission's written consent, and this had not been obtained. However, the regulator found none of the charity's trustees were being remunerated for serving as trustees, rather, they were employed as staff members. To ensure the charity became compliant, the regulator insisted Deafinitions had a majority of unpaid trustees who could independently review payments to other board members and ensure they are in the charity's best interest.



ADDACTION HAS BEEN AWARDED A NEW £5M CONTRACT to provide its services to people across Herefordshire. Under the five-year contract, the charity will expand the options open to adults and young people recovering from alcohol and drug issues. The contract is £1,774,000 a year for an initial period of three years with the option to extend for a further two years. It was agreed by Herefordshire Council at cabinet level. Addaction is working with existing providers to ensure a smooth transition of staff and resources. The new service will start on 1 December and Addaction said service users will be at the heart of how it is delivered. As part of the new service, peer support and mutual aid work will be expanded, staff will develop links within the community to offer service users opportunities to build life skills and a comprehensive volunteering programme will be implemented. The charity also plans

"The regulator insisted Deafinitions had a majority of unpaid trustees who could independently review payments to other board members"

to offer more support groups for families, carers and friends of service users.

THE INCLUSION OF CHARITY-SPECIFIC ADVICE in The Pensions Regulator's new guidance on assessing the employer covenant for defined benefit pension schemes has been welcomed by the national representative body for workplace pensions. TPR has published new guidance on how to assess and monitor an employer's covenant - the employer's legal obligation and financial ability to support their scheme. The guidance aims to help schemes apply the defined benefit (DB) funding code of practice. For the first time, the guidance contains a section with specific considerations for schemes in the not-for-profit sector, and non-associated multi-employer schemes popular with charities. An annex dedicated to not-for-profits states that the absence of a profit motive does not change how the employer covenant should be assessed, but the nature of some NFPs' activities and financing arrangements means some elements of the guidance may apply differently. How organisations should apply the guidance can vary depending on the proportion of their income that comes from donations, for example. Restricted funds are also a consideration outlined in the guidance.

LOCAL INFRASTRUCTURE CHARITIES

are increasingly optimistic about their short term prospects but remain wary over the longer term, according to NAVCA's latest quarterly member survey. The study showed 72 per cent of respondents reported stable or increased income over the last quarter. Short-term optimism was the highest it has been in the survey's three-year history, with 61 per cent of respondents positive about the next quarter. However, 71 per cent of respondents felt their funding would get worse over the next 12 months, and 76 per cent said funding for their local voluntary and community groups would get worse. The regular survey uses a representative sample panel of NAVCA members to track trends in local voluntary action. The survey has been run every three months since July 2012, and the latest took place in July 2015. Increased demand was reported by 60 per cent of respondents, with 40 per cent saying it has stayed the same and none reporting decreased demand. Income was up for 22 per cent of respondents over the last quarter, and had remained flat for 50 per cent. Increased workload was the biggest issue in front of the majority of members, and 83 per cent of respondents planned to increase or maintain the extent of their services over the coming year.

THE DIRECT MARKETING

ASSOCIATION has published a set of guidelines for call centres on how to identify and manage dealing with vulnerable people. Age UK, Alzheimers Society, Dementia Action Alliance and Rethink Mental Illness all support the voluntary initiative, which has been produced in conjunction with companies including BT, nPower, Blue Donkey, KMB Ltd, ReynoldsBusbyLee, Orbital Response and Steve Smith. The guidelines set out step-by-step the signs to look out

for to identify consumers who may be unable to make an informed decision, such as those living with dementia or mental health issues, and how best to communicate with them. In a statement the DMA said the new guidelines are an update of guidance produced in 2012. The association will provide support and advice to companies on how to adapt their training and processes to incorporate the guidelines.



NATIONAL CHARITY SHAW TRUST

has opened its new headquarters in the centre of Bristol. Shaw Trust has over thirty years' experience helping disabled and disadvantaged people to gain skills and get into work. It delivers employment support to thousands of people every year on both the mainstream Work Programme and the specialist disability Work Choice schemes. The charity also provides support through a range of other activities, such as its social enterprise projects, national volunteering scheme, and a network of over 50 charity shops across Britain. Shaw Trust's head office was previously located in the White Horse Business Park in Trowbridge. The new headquarters will coordinate Shaw Trust's charitable activity, spread across more than 200 sites throughout the UK. Chief executive

Roy O'Shaughnessy said the charity chose to move to Bristol because it is a "vibrant city with a bustling economy, fantastic talent pool and great links to the rest of the United Kingdom". The move also means the charity remains in touch with its roots in the South West.

A NEW £5M SOCIAL INVESTMENT

FUND has launched in Bristol, developed and run by Resonance and sponsored by UBS Wealth Management. The Resonance Bristol Social Investment Tax Relief Fund aims to incentivise investment in charities, community interest companies and community benefit societies. It has targeted a post-tax Internal Rate of Return of about 8 per cent. The fund is open to eligible investors from today, with a minimum investment level of £10,000. It will soon be available on the UBS Wealth Management platform, and to UBS Wealth

"Resonance plans to grow more than £30m of SITR funds in several other cities across the UK over the next few years"

Management clients and clients of IFAs who may have a relationship with UBS. Resonance plans to grow more than £30m of SITR funds in several other cities across the UK over the next few years. But, announcing the fund's launch, Resonance said further expansion is dependent on the removal of an EU cap which effectively limits SITR investment to £275,000 for each individual organisation.

THE CITY BRIDGE TRUST has awarded Lambeth-based Homeless Link £148,100 over three years towards its work to improve efficiency and boost the impact of small homelessness charities. Homeless Link, a national membership charity supporting and representing organisations working directly with homeless people across England, is working to improve services for homeless people and campaign for policy change that will help end homelessness. It offers more than 500 members a range of services including advice, training, networking, and funding. The grant from City Bridge Trust will enable Homeless Link to support 67 smaller London-based homelessness charities, many of which are applying for shrinking funding. The trust said this capacity-building helps improve charities' data collection and analytical skills, so they can deliver more sustainable services based on evidence of need and have better influence over local policies and practice. City Bridge Trust, the City of London Corporation's charity, has awarded grants totalling a third of a billion pounds to charitable organisations tackling disadvantage in Greater London over the past 20 years.

THE CHARITY COMMISSION CONFIRMED IT WOULD NOT REGISTER Annuity Helpline, after deciding the organisation was not established for exclusively charitable purposes. Annuity Helpline's purposes are to educate the public going into retirement on all the various options for retirement income. The organisation aimed to achieve its purpose by setting up a freephone 24/7 helpline for retirees to call for advice/information. The outcome was said to be "to educate as many members of the public as possible entering retirement what benefits they currently have, what

they may lose if they give up those benefits and what options are available to them regarding retirement income". The application was rejected in July. After consideration in Decision Review, the regulator said it "was unable to establish that the organisation provided education in the charitable sense", specifically whether the service would develop the skills and competencies of service users. The commission also had difficulty seeing how the services provided by Annuity Helpline were for public benefit, rather than personal benefit to individuals achieving an



improvement to their financial circumstances. "The commission concluded that purposes of the organisation allow in scope for non-charitable purposes to be furthered and are not exclusively charitable," the regulator said. "As such, it refused the application to constitute and register Annuity Helpline as a charity because it was not satisfied that the CIO would be a charity at the time it would be registered."

ACCESS: THE FOUNDATION FOR SOCIAL INVESTMENT is consulting on the design of its £60m, 10 year capacity building programme. The programme will see the recently-launched foundation spend down a £60m endowment over the next decade to support more charities and

*"Charities
Aid Foundation
distributed £478m to good
causes in the past year,
compared with £443m in
the previous period"*

social enterprises to be able to engage with social investment. The consultation on the programme's design will run until the end of September, with funded programmes beginning next Spring. Access was launched in March to fill gaps in the social investment market that have prevented some voluntary organisations, charities, and social enterprises from accessing finance. As well as the capacity building programme, Access is also managing the 'Growth Fund', which combines grants with loans for social lenders to offer investments of up to £150,000 to charities and social enterprises.

CHARITIES AID FOUNDATION

ACHIEVED GROWTH in both its own income and the funds it distributed to charities in 2014/15, the organisation's annual report shows. CAF distributed £478m to good causes in the past year, compared with £443m in the previous period. Total income was £466.9m, up from £418.2m 2013/14. The amount distributed to charities by wealthy philanthropists through CAF increased by 19 per cent to just over £156m, while corporate donations from companies working with CAF reached just under £82m. CAF's social investment arm Venturesome supported another 23 social enterprises and not-for-profit organisations. Work included supporting Interhealth to create a new base in Nairobi to provide vital medical and psychological support to

health workers travelling to tackle Ebola. The Give As You Earn payroll giving service saw £70m reach charities from employees at more than 3,000 firms, while CAF Charity Accounts helped deliver £100m.

CAGE DIRECTORS COMMISSIONED AN EXTERNAL REVIEW

of the Mohammed Emwazi case, and the subsequent media coverage and interviews. In February CAGE research director Asim Qureshi was widely reported to have made public statements about Mohammed Emwazi, believed to be the ISIS militant popularly known as 'Jihadi John'. Qureshi was reported to have raised questions around the role of counter-terrorism policy and tactics in disenfranchising individuals, and the part that played in making people vulnerable to radicalisation. A media and public backlash resulted, and in March the Charity Commission sought assurances from The Roddick Foundation and The Joseph Rowntree Charitable Trust that they were no longer funding CAGE and had no intention of doing so in future. CAGE director Dr Adnan Siddiqui said the review is an opportunity for "anyone concerned with how CAGE is changing the prevailing War on Terror narratives" to contribute to discussions that will help shape the way forward in constructive and meaningful ways.

THE SCOTTISH COUNCIL FOR VOLUNTARY ORGANISATIONS has launched an informal review of fundraising in Scotland to assess whether or not the current system of public charity fundraising self-regulation is working. The review, which will report back by the end of August, will be led by a reference group made up of third sector representatives. It will also include a survey on views about fundraising among members of the public,



charities with an interest in the sector's reputation, charities who fundraise and professional fundraisers. The Scottish Government asked SCVO to conduct the review to run alongside a review of fundraising being carried out in England and Wales.

BIG SOCIETY CAPITAL announced in August its first investment to be successfully repaid since it was established in 2012. The redemption comes from the £2m Scope charity bond. Big Society Capital supported the bond through a £875,000 investment into Investing for Good, the social finance intermediary who arranged and underwrote the transaction. Launched by Scope in May 2012, it was one of the first charity bonds to be listed on an established stock exchange by a UK charity. Big Society Capital, along with its co-investors, has committed £374m to invest into charities and social enterprises via products such as social impact bonds, property funds and charity bonds. Over the past three years, the disability charity has used the capital raised to help open 20 new shops and to assist in growing its donor base by another 100,000 new supporters. This has enabled Scope to generate unrestricted revenues to help fund the charity's additional programmes such as the training of parent befrienders to run peer support groups for parents with severely disabled children.

MOST YOUNG FULL-TIME WORKERS

in London want to spend more of their time volunteering, according to a new study. A survey of under-35s working in the capital found 53 per cent want to volunteer more than they do, rising to 60 per cent among 18 to 24 year olds. The number falls to 35 per cent among over-55s, the oldest age group in the survey. The study was carried out by the Centre for Charitable Giving and Philanthropy at Cass Business School, commissioned by City Philanthropy and drawing on a YouGov survey of more than 1,000 Londoners. Nearly half of under-35s agreed employees are looking for companies that aim for social and environmental value as well as business success and profit. Current and recent workplace schemes and initiatives were second to friends as the largest influence on the giving and volunteering of the under-35s surveyed, with 26 per cent mentioning its positive influence.

ONE IN SIX BRITONS OVER THE AGE OF 60

have included a charitable donation in their will, according to a new survey from Remember A Charity. The study also found that of those who had not left a legacy, 35 per cent said they would consider doing so. The survey covered 2,000 UK adults across two groups, 45 to 59 year olds and those aged 60-plus. It found 22 per cent of over 60s spent time volunteering, 47 per cent said they feel at least 10 years younger, and one third said they are more likely to seek out new experiences than they were 20 years ago.

OVER THREE QUARTERS of UK adults expect to donate to charity in 2015 at an average of £110 per person, new research has found. The study by Consumer Intelligence for Cambridge & Counties bank found 14 per cent of people expected to give more to charity this year.

People on the move...

The latest appointments from around the charity sector

If you have any appointments to announce please contact matthew.ritchie@charitytimes.com



TINA HOULIHAN

Buckingham-based national sight loss charity **RP Fighting Blindness** has named Tina Houlihan as its new CEO. Before joining RP Fighting Blindness Houlihan was head of hospital charities at East & North Hertfordshire NHS Trust, and prior to this she was head of partnerships and major gifts at Muscular Dystrophy UK in London. RP Fighting Blindness is dedicated to finding a cure or treatment for retinitis pigmentosa, a hereditary disease of the retina.



JON SPIERS

Autism research charity **Autistica** has appointed Jon Spiers as the new chief executive. Spiers joins from healthcare consultancy Just: Health Communications, where he was head of public affairs. He was previously head of public affairs and campaigning at Cancer Research UK, leading high profile campaigns on issues including cancer screening, radiotherapy and charity finance.



ADRIENNE SKELTON

Arthritis Research UK has appointed Adrienne Skelton as strategic development director. Skelton brings 14 years of charitable sector experience to the role. She joins from Macmillan Cancer Support where she was head of evidence, contributing insight to the new cancer strategy for England, developing an external-facing data aspirations strategy.



ANDREW HIND

Andrew Hind has been appointed chair of the **Fundraising Standards Board**. The new role will see Hind step down from his post as editor of Charity Finance magazine, but remain as non-executive director and strategic adviser to its publishing group, Civil Society Media. He was the first chief executive of the Charity Commission from 2004 to 2010, and previously worked in senior management at Barnardo's and ActionAid.



JEN PAICE

Jen Paice has been appointed chair of **One Parent Families Scotland**. Paice has been CEO at SafeDeposits Scotland, the tenancy deposit scheme, for two years. Her previous experience includes managing strategy and business change at Lombard Asset Finance, where she also chaired the corporate social responsibility board. She chairs her first board meeting on 6 August.



DAVID CROSBY

David Crosby has joined **Breast Cancer Care** as director of services and engagement. Crosby was previously general manager for Central and South West England for Macmillan Cancer Support. Prior to this he worked in social housing for 22 years. Crosby will be building on the national and regional services the charity offers to support people facing breast cancer.



ROGER MOORS

Social Investment Scotland has appointed Roger Moors as its new chief development officer. Moors joins the charity and social enterprise from his role as chief executive officer of Social Enterprise East Midlands. In the past two years he has helped secure in excess of £2.5m of investment finance for third sector applicants. He also managed the £1m Nottingham Social Impact Fund providing finance to start-up social businesses.



JONATHAN PELLUET

Children's communication charity **I CAN** has appointed Jonathan Pelluet as director of fundraising. Pelluet started his career in the financial sector, including at market data company Thomson Reuters. His fundraising career has seen him spearhead FareShare's corporate partnerships programme before leading Revitalise's fundraising efforts.



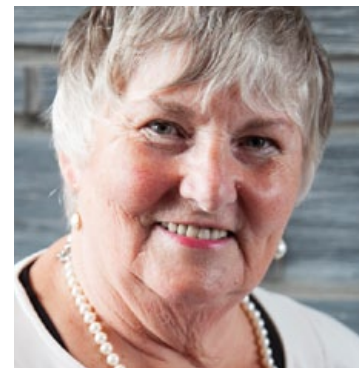
POLLY SHUTE

National youth volunteering charity **vInspired** has appointed Polly Shute as director of fundraising and communications. Shute was formerly fundraising project and campaign director at British Heart Foundation. vInspired has recently undertaken a strategic review, and Shute will be responsible for securing new sources of funding to support plans to increase youth participation in social action.



CHRIS SHERWOOD

Relationships charity **Relate** has appointed Chris Sherwood as chief executive. Sherwood was previously director of policy, communications and digital services at the charity. He was previously director of innovation and development at Scope, and a senior development manager at Nesta. Sherwood has over 10 years' experience of working in the voluntary sector and prior to this he worked in Westminster and local government.



BARONESS RENNIE FRITCHIE

Lloyds Bank Foundation for England and Wales has appointed Baroness Rennie Fritchie DBE as its new chair. Baroness Fritchie's experience includes a post as chair of not-for-profit IT company Nominet, as an independent crossbencher in the House of Lords, and the patron of charities including Winston's Wish, Pied Piper Appeal, and Odyssey.

credit: Ruth Davey

September 2015



CHARITY TIMES AWARDS 2015
7 October 2015
[Park Plaza Hotel, Westminster Bridge, London](#)

The Charity Times Awards reaches its sixteenth year in 2015. The Charity Times Awards continues to be the pre-eminent celebration of best practice in the not-for-profit sector. The awards reward the work carried out in difficult and competitive conditions, and establish a unique annual congress of the pre-eminent figures in the sector at the premier charity event of the year.
charitytimes.com/awards



ACEVO AUTUMN HEALTH & SOCIAL CARE CONFERENCE
21 October 2015
[Harehills Rd, Leeds, West Yorkshire LS8 5HS](#)
ACEVO's health and social care conference returns to Leeds, to consider what this parliament has in store for third sector organisations working in health and care. Delegates will hear from political representatives as well as experts on the critical issues. This is the opportunity for third sector leaders to debate, learn and reflect on the next five years.
<http://bit.ly/1LkNmW5>



TACKLING FRAUD IN THE CHARITY SECTOR
31 October 2015
[Royal College of Physicians, 11 St Andrews Place, London](#)
Fraud is a serious threat to every organisation – and charities are no exception. This conference will bring together senior figures from the charity and counter-fraud worlds to discuss the challenges charities face, highlight current risks, and share best practice. Speakers include representatives from: British Council, Cifas, Help for Heroes, and Institute of Business Ethics.
<http://bit.ly/1E3xFQH>


Not to miss...

SOCIAL MEDIA RISKS FORUM
15 October 2015
St. Pancras Renaissance London Hotel
socialmediarisks.co.uk

ACEVO ANNUAL CONFERENCE 2015
19 November 2015
Victoria Park Plaza, London
<http://bit.ly/1LjblwH>

NCVO/BWB TRUSTEE CONFERENCE 2015
2 November 2015
Kings Place London
ncvo.org.uk/training-and-events/trustee-conference

BETTER SOCIETY AWARDS 2016
12 May 2016
Millennium Hotel, Mayfair, London
charitytimes.com/bettersociety



What does this parliament have in store for third sector organisations working in health and care?

With the devolution agenda picking up pace and mental health proving a big General Election issue, this conference will focus on the critical role of the third sector in helping to drive changes across the health and care system.

Register today at
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Free event for
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Health and Social Care Conference

Autumn 2015

Sponsored by **HEMPSONS**

Wednesday 21 October 2015
Shine - Harehills Rd, Leeds LS8 5HS



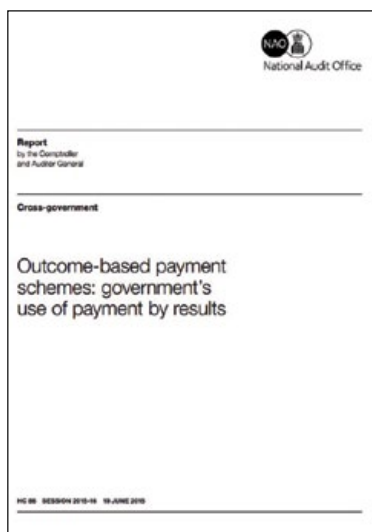
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The NAO report into outcomes-based payment schemes raises serious questions about the evidence base for Payment by Results contracting's effectiveness.

The principle of PbR, that providers should be financially accountable for the outcomes they deliver, is difficult to object to, especially for an organisation with a mandate to assess value for money. The NAO's report therefore focuses on practical considerations.

The report highlights that PbR contracts are not suited to all public services, and if applied inappropriately there is a risk that quality of the service and value for money are undermined. The NAO remind us PbR is a technically challenging form of contracting, and commissioners need to understand the potential provider's capacity to take on risk. This includes looking further down the supply chain at the issues voluntary sector subcontractors have faced working with prime contractors, including the extent to which risk is allocated and the types of work referred to them.

NCVO have long been aware that PbR contracts can limit the involvement of expert voluntary sector organisations in crucial public services. The Work Programme is a case in point.

Research we conducted with BWB in 2012 of voluntary sector organisations' experiences of the Work Programme found serious cash-flow problems for

Outcome-based payment schemes: government's use of payment by results by NAO

KARINA RUSSELL FINDS THE NATIONAL AUDIT OFFICE'S REVIEW RAISES SERIOUS QUESTIONS ABOUT THE EVIDENCE BASE FOR PBR'S EFFECTIVENESS AS A MECHANISM

KARINA RUSSELL IS PUBLIC SERVICES POLICY ANALYST AT NCVO

charities, with 70 per cent of respondents fearing their contracts would not be viable for the full term, and nearly half subsidising service delivery with their own reserves. We also found 50 per cent of respondents received fewer than 10 referrals a year into the scheme. This led to a number of charities feeling they had no choice but to withdraw completely from the programme.

Although the NAO's report focuses on the application of PbR, reading between the lines it is possible to identify more fundamental concerns. It highlights the almost non-existent evidence base for the government's use of PbR for public service contracts and calls on the Cabinet Office and the Treasury to build a repository of information and expertise that can inform future use. But if there is a lack of credible evidence, how do we know that PbR works at all?

This wouldn't be the first time outcomes-based commissioning has been questioned. Newcastle University's Toby Lowe has argued PbR is intrinsically flawed and creates unwelcome paradoxes. He is one of many who argue that instead of improving the lives of service users, a focus on outcomes distorts organisations' priorities, making them more inclined to focus on service users who are easiest to help, neglecting those most in need and sometimes even exaggerating the outcomes they've achieved. This may explain the Work Programme's notable failure to make a difference for those furthest from the labour market.

Meanwhile, the complexities of issues in a service user's life can make it near impossible to trace any outcomes back to an organisation's intervention. Those with the most complex needs have factors that can affect their lives that an organisation intervening has no control over, from relationships to local job markets. As such, Lowe argues it's unreasonable to hold them to account over outcomes.

The NAO report echoes what our sector has been saying for a long time and for those with an interest in public service delivery it gives us a lot to think about. Which services are most appropriate for PbR, the most effective payment models and even whether PbR should be used at all are matters for discussion. This debate desperately needs a stronger evidence base and until that happens, supporters and sceptics alike should keep an open mind about the effectiveness of outcomes-based payment schemes. ■

A Tale of Two Funds: The management and performance of the Futurebuilders-England fund by Boston Consulting Group

ABIGAIL ROTHEROE FINDS IT REMAINS DIFFICULT TO ASSESS IN DETAIL HOW THE FUND PERFORMED

ABIGAIL ROTHEROE IS DEPUTY HEAD OF CHARITIES AT NPC

The Boston Consultancy Group in July published a report into the performance of Futurebuilders between 2004-2010, one of the largest social investment funds in the UK. Big Society Capital has called it 'perhaps the big social investment initiative of the noughties,' and it disbursed £145m over 10 years to more than 360 organisations.

Beyond the numbers, there are important details. The report clarifies, for example, that loans were only made where organisations didn't have access to cash from other lenders—which ensured Futurebuilders didn't undercut the market, but also helped get money to causes which may otherwise have been ignored.

There is insightful analysis, too, of which organisations defaulted on their loans. Where they received both grants and loans, they were more likely to miss repayments, whereas those just getting loans appear to have paid back the cash more reliably. There is no further breakdown of this data, but it may be that organisations on a stronger financial footing were well placed to receive and utilise loans, while a mix of loans and grants went to bodies which were less financially secure (and a higher risk).

The report explores how social investment can interact with other parts of the charity landscape. Futurebuilders made loans to organisations to help them bid for government contracts, and expected them to then use contract payments to repay the initial loan. This is an innovative approach to squeezing the greatest possible leverage from Payment by Results contracts. Such innovation is to be welcomed, even if the main thing is to learn from its failure: when organisations didn't win contracts, there was no money to pay back the loan. As the report drily notes of contract repayment, 'this was often easier said than done.' But it remains difficult to assess in detail how the fund performed.

Firstly, it's a pretty partial picture. We have information only on investments where lending has now ceased (the closed portfolio), which represents just 20 per cent of the fund's total capital. Data on the rest of these investments is probably many years away.

As a result, it would be unwise to draw too many conclusions about the fund. The report reveals that the closed portfolio yielded a negative Internal Rate of Return of



-3%, "arguably more positive than might otherwise have been expected" given the newness of the investment and the complexity of the market. It was also doubtless affected by a welcome policy of not penalising charities who repaid early, although these funds were not recycled back into the charity sector.

The picture will become much clearer when the data surfaces from the remaining 80 per cent of investment. Such data could be crucial to everyone interested in funding social enterprises. It could inform funding decisions for charities long into the future. But it is still way too early for that.

There is one more omission to mention, even if it's understandable. There was evidently no effort to measure the social impact of all these loans and grants (such measures were 'predominantly absent throughout the majority of Fundbuilders' lifetime' as the report fairly notes). But as impact measurement becomes increasingly widely spread, fewer social investment funds will have this excuse.

Ideally, the future will see the publication of the financial performance of social investments to date - a journey started by this report and by the social investment market through a data lens. It is imperative that we know what difference it makes on the ground where it matters. It's time to get that ball rolling too. ■



Service Nation 2020 is an attempt by Demos to pull together existing evidence to make a compelling case for the value of youth social action. They define social action as “practical action taken in the service of others”. Whilst their definition includes volunteering it encompasses a much broader range of action. The report looks at the value to participants and the ‘double benefit’ social action brings to society.

The authors successfully pull together a wealth of relevant research and will be of use to others working in this field. However, its recommendations are a throw-back to another era. They call for new funding, a cross government strategy and an independent coordinating body. All laudable objectives but completely out of step with the age of austerity. They offer no consideration of what is currently delivered and whether it is possible to deliver it in any other way - or make any savings that might be re-invested. It's as if we have been transported back to the 2000's.

However, the report will bring joy if you are a player of ‘recommendation bingo’. You can tick off the classic ‘they should teach this in schools’ and ‘have trip-advisor style ratings’.

Demos say they are a cross-party think tank. This may explain the lack of politics in the report. At a time when young people have been major victims of cuts,

Service Nation 2020 by Demos

NEIL CLEEVELEY FINDS DEMOS' REPORT SUCCEEDS IN MAKING THE CASE FOR THE 'DOUBLE BENEFIT' OF YOUTH SOCIAL ACTION, BUT FAILS TO UNDERSTAND THE BIGGER PICTURE OF WHAT AUSTERITY IS DOING TO LOCAL SERVICES

NEIL CLEEVELEY IS CHIEF EXECUTIVE OF NAVCA

the report ignores any impact this may have on youth social action. It also fails to acknowledge that young people from different backgrounds may have very different experiences in their access to activities and opportunities. It does not consider whether there could be benefits to young people or society by providing targeted support.

I was also disappointed that the report doesn't dig deeper in to the value of the National Citizen Service. This programme is now the biggest single government investment in this area, so it warrants more attention. The report does not question whether they have the right approach to supporting youth social action or whether its aims could be achieved in a different way. The report trumpets that the evaluation of NCS shows it brings in between £1.70 - £6.10 of benefits for every pound spent. As well as appearing a broad and therefore meaningless range, is this even impressive? A quick google search tells me that £1 of investment in flood defence brings back £8, museums report £10 return for every £1 of public money spent and marketing the National Forest in Derbyshire brings in £24 for every £1 of public money.

A quote used in the report questions whether the Government is “putting all their eggs in one basket” with NCS and that greater success will be achieved by rooting national youth action programmes in local activity. I have to say I share this view. The report offers some backing for this view by saying that it is vital to maintain “a plurality of providers across the lifestyle”. However, the authors then fail to show they understand that cuts to local government funding have devastated local services for young people – both services traditionally delivered by local councils and by local charities – making this “plurality of providers” much harder to achieve in communities.

Overall this report left me unsatisfied and wondering exactly what the authors were hoping to achieve. Whilst it does succeed in making the case for the ‘double benefit’ of youth social action it also fails to understand the bigger picture of what austerity is doing to local services. My first reaction to this report and the recommendations is that I've heard it all before. Further reflection though leads me to a more generous conclusion. Maybe the problem is not the weakness of this report but more the fault of Government for not doing enough to support local youth action. I welcome this attempt by Demos to champion support for young people and youth action but maybe there are times when even a cross party think tank needs to get off the fence. ■

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Branding

SUE COTTON ARGUES THAT IN AN INCREASINGLY COMPETITIVE ENVIRONMENT, CHARITIES NEED TO STAND OUT FROM THE CROWD TO WIN CONTRACTS, GRANTS, AND SUPPORT



**SUE COTTON IS
CHIEF EXECUTIVE
OF CANW**

Our roots have always been in foster care, and in the North West of England, but in the last five years we've countered a more demanding, leaner marketplace by diversifying both geographically and in terms of the services we offer, covering areas such as therapeutic services, youth justice and working with vulnerable adults and young carers.

It's an evolution that's helped to grow the organisation and keep us relevant as service provision has changed, but it started to become apparent that our name and branding were becoming something of a drawback. Having 'child' in our name meant some service users and commissioners questioned our ability to provide specialist services for youths and adults.

The 'North West' part of our title also presented issues: if we were trying to demonstrate a local approach commissioners might query our knowledge of, say, Salford; if we were looking to gain contracts outside the North West we'd sometimes face questions about whether we could scale up enough to take on work beyond our home region.

We were aware we needed to address our brand and reposition ourselves to give stakeholders a clearer vision of our aims and values, so when we were approached to be the chosen charity of the year for marketing agency Jaywing we knew we had a fantastic opportunity to examine our profile and make some changes.

I think a lot of people still see a rebrand as just a change of logo and colours, but it's so much more than that: the whole process took us around 18 months and a lot of consultation with staff, service users, commissioners and trustees. You can't just change your logo and say "there you go, that's us", it's about creating something your stakeholders believe in and that sums up your values and aims – there's a lot of people to please.

For any charity that's looking to rebrand I'd say the first step is to be clear about what you're going to get out of rebranding, because you have to sell that to people internally.

Winning over a board of trustees can be difficult, but it's much easier if you can show them the

strategic benefits. Feedback from our consultations with commissioners, staff and service users showed they felt very strongly there was a need for change, and once the board could see that, they were 100 per cent behind the rebrand.

Changing our name was something of a sticking point because of the charity's heritage. We went with CANW because that's how we're known locally and it seemed like a natural progression. Once our stakeholders saw the name in the proposed branding, everything started to fall into place.

A lot of our work with Jaywing was about identifying and distilling down what it is we do. CANW's aim is to help children, families and individuals with the full range of issues they're experiencing and focus on what they can do as a starting point to support them. We developed this into the "we can" message that runs throughout our new branding.

It's a message that spells out clearly to commissioners and service users that we're able to achieve great outcomes across a range of services and conveys the positivity that runs through the whole organisation, in every aspect of what we do to sustain change.

The colours and imagery we developed for the brand convey much more strongly the warmth and care we generate as an organisation and really make us stand out to commissioners, fundraisers and service users – feedback on our old branding suggested it looked a bit like a hospital!

The rebrand has given us the opportunity to hit the reset button and to communicate more effectively the full breadth of interlinked services CANW offers.

It's a move that will help to ease the transition as we diversify geographically and in terms of services, and gives us a figurehead brand to encompass what we do in a much more modern, relevant way.

It's vital charities embrace change in the current climate, but it's important not to see a rebrand as a quick fix: it's a long process, but ultimately one that should enable you to shout about who you are, what you do and most importantly what you can deliver. ■

Leadership**LISA WEAKS ASKS WHETHER THERE SHOULD BE MORE DISCUSSION ABOUT THE QUALITY OF LEADERSHIP IN THE SECTOR**

The third sector has been under scrutiny in recent months, where organisations' management and leadership have been called into question. Is enough emphasis and thought devoted to leadership styles, the culture this creates and whether this fully reflects the organisation's aims and ethos?

The NHS has invested considerable resource and time in understanding these issues and in developing its leaders, partly in response to well publicised failings in leadership in NHS organisations. Mid Staffordshire Hospital Trust was one such case, where leadership failings resulted in appalling care for patients. This prompted the acknowledgement that to create a culture of compassionate care, it is vital to develop the people who lead NHS organisations.

Third sector leaders face many of the same challenges. The sector needs highly skilled leaders who can foster empowering organisational cultures. They need to be able to adapt, collaborate and thrive in increasingly competitive, complex environments.

We are often told by third sector leaders that they feel isolated and that being a CEO can be a 'lonely' and unsupported place. They report they rarely get time away from their organisation to reflect, be challenged, to learn about new ways of working, and ultimately to make themselves more effective. We find that third sector organisations rarely have the resources to pay for leadership development and there are very few high-quality leadership programmes designed around their needs.

The King's Fund supports third sector leaders, funded by GSK, through the GSK IMPACT Award Network – a unique learning network of 62 award-winning charities working in health and care, virtually none of which have the resources to invest in their own leadership. These organisations may have received a small amount of money from elsewhere to work on specific areas of organisational development, sometimes as a top-up from a grant, but this is not the same as dedicated leadership development.

So what does good leadership look like?

There has been a tendency to see leadership as based on a strong individual with a personal vision, a 'heroic' leader. Our research instead highlights the benefits of collective leadership – whereby everyone takes responsibility for the success of the organisation as a whole, not just their own jobs or area. Where cultures of collective leadership thrive, all staff members are likely to attempt to solve problems, promote responsible, safe innovation and, in the NHS, ensure quality of care.

The single most important task for a leader is to create the right organisational culture. Culture is a set of shared behaviours and implicit assumptions that members of an organisation hold and that determine how they perceive, think about and react to things. Every interaction in an organisation both reveals and shapes its culture. For instance, how staff talk to or about service users, how they talk to each other – if new staff or volunteers observe senior staff behaving aggressively or brusquely, this becomes assimilated.

Emotional intelligence is important to all of this and can enable leaders to adapt to different situations and stakeholders. Leaders need the capability and willingness to reflect on what is happening, including their own behaviour and the impact this has on their staff, volunteers and partners. Developing empathy is important for leadership, being able to answer the question 'what is it like to be on the receiving end of this?'

Many third sector organisations are reliant on public sector commissioners or high-profile funders for income. This can lead to a frustrating power imbalance where maintaining authority, autonomy and confidence can be challenging. Third sector leaders therefore need negotiating and problem-solving skills, and the ability to respond to different situations flexibly and effectively.

So, should funders, commissioners and third sector leaders (and their boards) be talking more about third sector leadership, acknowledging what it is and why it is so important? Can they afford not to? ■



**LISA WEAKS IS
THIRD SECTOR
MANAGER AT THE
KING'S FUND**

Fraud

DAVID KIRK ON THE RISKS TO CHARITIES AND WHAT PREVENTATIVE MEASURES CAN BE TAKEN



**DAVID KIRK IS
CHAIRMAN OF THE
FRAUD ADVISORY
PANEL**

Fraud is a serious threat to every organisation, business and individual – and charities are no exception. The opportunities for fraudsters to take advantage of weaknesses in their defences are increasing at the same pace as the technology that governs all our lives. The threat from cyber-enabled fraud – involving sophisticated attacks on business systems – is matched by old-fashioned theft, impersonation and fraud that can be perpetrated both from outside the charity, and from within.

Research from the National Fraud Authority previously found that the most common types of financial crime affecting the sector are payment / banking fraud, accounting fraud and identity fraud while just under a quarter of these frauds were enabled from within the charity. The very nature of a charity, full of good intentions, generosity and trust, perhaps adds to the vulnerability to fraud risk of the sector.

Research commissioned by the Fraud Advisory Panel has found that almost half of all detected fraud is discovered through a charity's internal controls or audit processes.

The problem is that internal controls and audit, which are the backbone of large organisations, can be difficult to manage for the vast majority of small charities that cannot afford to have the level of professional support that they might need. A significant proportion of charities surveyed (particularly smaller ones) did not have any common anti-fraud policies and procedures, risk registers or fraud response plans in place. No doubt some of them thought that fraud will never happen to them, so there is no point in spending precious time and money on any counter-fraud measures.

The fact is, however, that the impact of fraud, large or small, extends well beyond the direct financial loss resulting from the fraudulent activity. The inability to fund specific projects and activities will, of course, be devastating, but reputational damage can be even more compromising. Concerns about the financial competence of a charity will very quickly lead to a reduction in donations. The impact on the morale of staff, including volunteers, should also not be underestimated. With charities relying very heavily on volunteers, loss of trust may

quickly result in staff losses. It is therefore vital for charities of all sizes and types to build strong fraud defences to protect income and assets and meet their duties.

A framework for assessing fraud risk and a robust system of internal financial controls are the key elements of good fraud avoidance. This kind of approach will help to sharpen an organisation's focus on how to prevent, detect and respond to fraud. The Charity Finance Group, in association with the Fraud Advisory Panel, and others, has produced a helpful guide for trustees and managers on fraud prevention which highlights the following steps:

- Instil a culture of ethical behaviour throughout your charity;
- Develop an anti-fraud policy;
- Understand your risks (take regular assessments of the risks your charity might be exposed to);
- Implement robust financial controls and reinforcing the importance of these (use the Charity Commission's CC8 guidance and checklist for reference);
- Ensure there are robust recruitment procedures;
- Develop a whistleblowing policy, encourage awareness throughout the charity by communicating anti-fraud measures and training staff; and
- Keep records of suspected and confirmed fraud.

The Charity Commission and Fraud Advisory Panel are hosting a one-day fraud conference to equip trustees and managers with the knowledge and skills needed to recognise the tell-tale signs of fraud and shape an effective response.

The conference, which is supported by a range of sector bodies, will bring together leading practitioners and senior figures from the charity and counter-fraud worlds to discuss the challenges charities face, highlight current risks, and share best practice.

Confirmed speakers include representatives from the British Council, Cifas, Help for Heroes, Institute of Business Ethics, Oxfam GB, and Save the Children International. ■

Threats and opportunities in a hot property market

SO COULD YOUR CHARITY END UP ON THE STREETS?.....

The Ethical Property Foundation has been advising not-for-profits with their property problems since 2004, over 3,000 clients to date, plus many thousands more who consult our free online resources. We engage with every possible property challenge for client organisations serving every human, animal and environmental need. Just in the last couple of years we have advised on light houses, an ice factory, a Quaker meeting house, a Victorian workhouse and a mediaeval gaol complete with stocks. Thankfully most clients are not in desperate straits and sensibly seek advice before their roof falls in or the bailiff arrives, but sadly we have had our fair share of those cases too.

Unfortunately the most vulnerable organisations are those with turnovers of less than 250K, which lack a staff with property responsibilities. This part of the sector often needs to take advice quickly, yet can too rarely afford it. Though of course bigger non-profits can come a cropper too and for the same reasons. These are in the main: poor governance – trustees who are not up to the job; poor or non-existent property management and budgeting; badly handled asset transfers which end up requiring far greater capacity, resources, and business skills originally envisaged. Plus the killer reason: basic ignorance. I never want to ever see a charity again with a three-year funding cycle turn up at our door with a 25 year lease. Don't smirk, it happens and you might even be funding it or its staff could be supporting a loved one.

And then there is location. No non-profit is an island, and yet it is because we are all crowded onto an urbanised island that property can be a nightmare for charities, however property savvy. If you are lucky or possibly unlucky enough to have premises in hot spots such as London and the South East, Leeds, Birmingham, Edinburgh, and Manchester, rents are rising fast. Increasing numbers of charities are being served notice to quit as landlords seek to improve old buildings to attract higher paying tenants.

As investors chase pockets of value, so rents rise fast even on the city fringes. Just how far

out of your city could your office be, if you are to retain your staff and serve your clients? Recently one of our clients serving an ethnic community in London and facing a 1,000 per cent rent rise, had to change their mem & arts because they had to move several miles east and therefore could no longer serve the community they were set up to serve.

As landlords seek to push up yields, leases are shorter - around five years - which offers greater flexibility for landlords and business tenants, but can represent a short term blight for charities which tend to grow more slowly.

Surveyor John Giblin of London-based surveyors Copping Joyce works closely with the Ethical Property Foundation as a member of our Register of Property Professionals. He says charities often have less awareness of local market conditions than commercial businesses and can be slow to act. "Yet if you are served with a notice to quit, you really can't afford to waste a moment."

"Leaving too little time to find alternative accommodation can have terrible consequences for your operations. With rents rising so fast, consider what cost saving measures you can take and seek professional advice.

"Bear in mind you'll need at least a month to find a new property - at least. Then two weeks for negotiation and four to six weeks for the solicitors to work through the lease. Then another month at least if there is a refit."

With change comes opportunity and many of the foundation's clients are now looking at more high density buildings - the days where charities spread themselves over several floors are going fast. Taking one floor not two saves a fortune in rent and management costs. Do we really need 150 sq. feet per desk? What about hot desking? Or co-location with another non-profit and sharing back office functions, providing even greater synergies and efficiencies.

However you serve and save the world, remember that as you will always need property to deliver your charitable purpose and it is a jungle out there - it really is the survival of the fittest. ■



**ANTONIA
SWINSON IS
CHIEF EXECUTIVE
OF THE ETHICAL
PROPERTY
FOUNDATION,
WHICH
SUPPORTS
CHARITIES AND
COMMUNITY
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ADVICE**

ethicalproperty.org.uk

It is estimated that there are more than half a million trustees in the UK, but popularity hardly makes it an easy job. Not only do trustees hold ultimate liability for a charity's actions, they must remain ever vigilant of the changing landscape in which their charity operates - be it

OnBoard - there are also a raft of umbrella bodies and non-profits offering training, networking events and guidance documents, too. These include NCVO, NAVCA, ACEVO, the Small Charities Coalition, the Association of Chairs and the FSI, to name a few.

don't think they would."

Others argue, however, that this wealth of resources fails to scale at a national level. "Some say there's a lot available for trustees, and if you live in London that might be your view," says Rebecca Weinberg, who is chair of St Gemma's Hospice in Leeds. Weinberg also helped to found ACEVO North, and currently leads the Yorkshire and Humber regional group of The Association of Chairs, an organisation established in 2013 to provide chairs with support and information.

"Outside London there are lots of publications and online resources, but not many events. And of course not all organisations can afford to send a trustee to London for an overnight stay."

GOVERNANCE

Sharing the load

Trustees bear an enormous responsibility.

Where can they access the resources, support and guidance they need?

WRITTEN BY CHARLOTTE SIMMONDS, A FREELANCE JOURNALIST

the influence of regulation, funding, or issues specific to their causal area.

With the sector under sizable pressure from the press, the public and their regulator to demonstrate accountability, it is arguable that trustees have never had it harder - but are they able to access the support, guidance and training they need to do their job?

Some experts say it is a case of information overload, not an information deficit. A Google search of "guidance for charity trustees in the UK", for instance, returns around 800,000 hits - while "training for charity trustees in the UK" returns more than 7.8 million.

While few would suggest that there are actually 8 million training providers to trawl through, it illustrates a picture that can be dizzying, particularly to those new to the sector, says governance expert Tesse Akpeki. Not only can trustees get training from private companies such as those she works through - Bates Wells Braithwaite and

"It's a big marketplace out there," says Akpeki. "When I started over 20 years ago, there was very little. But it has just grown and grown. The challenge is not about the amount, but about how and where to find it."

'Signposting' of information must be improved, she believes. "We need more strategic networking between umbrella groups, so that rather than having a thousand flowers blooming all over the place, we have a roadmap for how it links together. Lots of new trustees are curious and inquisitive, but the question is: would they know where to start? I

The commission's role

It is widely accepted that the urtext of trustee governance is The Essential Trustee (CC3). The Charity Commission's core guidance document has recently undergone a makeover, with a new version released in early July following a sector consultation. The document is noteworthy for its hardening of tone. The previous CC3 took a warmer and more welcoming approach, opening with a note congratulating trustees on their appointment; whereas the new guide aspires to "make it clearer that [the Commission] expects trustees to comply with specified good practice unless they can justify not doing so".

At a glance, the Charity Commission's guidance outlines that trustees must:

- Ensure the charity is carrying out its purposes for the public benefit
- Comply with your charity's governing document and the law
- Act in the charity's best interests
- Manage the charity's resources responsibly
- Act with reasonable care and skill
- Ensure the charity is accountable



Many credit this to the criticism leveled against the commission by the Public Accounts Committee in 2014, which called the regulator “not fit for purpose”. The commission says it has tried to strike a balance between a heavy hand and a helping hand.

“It’s an interesting dilemma,” says Neal Green, senior policy advisor. “A feeling that came out of the consultation on the new draft was that in using crisper, more direct language, we had lost some of the warmth. So we tried to emphasise that we know trustees do a difficult job. We want this to be a tool to help you do your best.”

He also raises the fact that, in the past, most trustees would have come to the CC3 in print form, whereas today most will be reading it online.

BUILDING THE RIGHT SUPPORT NETWORKS WITHIN THE ORGANISATION IS JUST AS VALUABLE AS FINDING THE RIGHT EXTERNAL RESOURCES

This has an impact on format, tone and language. “Writing for the web is about telling people plainly what to do, rather than talking around it. But of course when you make it more direct, it becomes more abrupt.”

Will more direct guidance help trustees to govern better? “I think the new document is very good; it’s where trustees should start,” says Akpeki, but agrees this new

language highlights the “paradigm shift” that many see taking place. “It is quite a different stance from the years when the commission was seen as more of a friend to the sector.”

Peer support

While the new CC3 remains the best thing to keep in your back pocket, guidance means more than having the right handbook. Trustees crave peer support in the areas they struggle, says Weinberg. “The problem with Charity Commission publications is that they aren’t very interactive, and having interaction is so important because a lot comes out in conversation.”

One of the key areas where trustees, and especially chairs, seek guidance is around building the right

Trusteeship

relationship with their chief executive says Jenny Berry, ACEVO's head of leadership and ACEVO North.

"I have seen relationships where the chief exec and the chair will speak for 15 minutes before the start of a board meeting, right through to a chair and chief exec that speak every day. It's made me understand the importance of establishing what works for you," she says.

The best time to develop good governance relationships is when things are quiet, she adds, because it is when things go wrong that the strength of the board will be put to the test. Have a written process for crisis management agreed between the trustees and chief executive as a priority, she advises.

Does this include who should defend the organisation publicly? "There's no clear answer," Berry explains. "Sometimes the chief exec will go out in front, with the chair playing a supporting role. The strongest thing, though, is if the pair can send a message together. A strong relationship sends a strong message in a crisis."

Look within

Her point underscores a wider truth about trusteeship - that building the right support networks within the organisation is just as valuable as finding the right external resources.

This is also important from a cost perspective, as "charities are likely to prioritise the work that they are doing rather than the [professional development of the] people who are running it," says Yasmin Batliwala, chair of drug and alcohol abuse charity WDP.

She adds that the makeup of boards is changing as the sector recruits more strategically, meaning trustees who are experts in a particular field - law, governance or finance, perhaps - may lack



**BUILDING THE RIGHT
SUPPORT NETWORKS WITHIN
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RIGHT EXTERNAL RESOURCES**

knowledge of day-to-day operations.

"When I joined the organisation in the early years, people were invited to become trustees because they had experience of working around addiction," she explains. "They might have been social workers or probation officers. That has changed significantly. Now we have more professionals who are not as aware of the day-to-day issues, but who understand governance and share a passion for the cause. I imagine many organisations are experiencing the same."

In light of this, she reminds that the best people to upskill board members in cause-related issues are those within the organisation. "At WDP, if someone on the board said they lacked knowledge in a particularly area, such as residential rehabilitation, it would be very easy to do that in-house."

Weinberg agrees that it is the collective responsibility of the board to support each other in "bringing their role to life".

"Our job can be quite onerous, and some trustees find it hard to get their head around how an organisation really works, and what their responsibilities really mean," she says.

She echoes Batliwala in saying that one of the best places to turn for support is your colleagues, and suggests holding trustee development events to build these relationships.

"I started doing events at St Gemma's because somebody told us we were a group of skilled individuals that didn't work as a team," she says. "We had our first one over some supper and a glass of wine, and got a charity lawyer to talk to us about our legal duties. The most valuable thing is when people start asking questions, because questioning your role is what makes it real" ■

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SHORTLIST ANNOUNCED!

Congratulations to the finalists!

Since their inception the Charity Times Awards have continued to grow at a rapid rate. Publishing director Mark Evans said that the quality and volume of entries this year was impressive, and making the shortlist is an achievement in itself.

"This annual celebration places the spotlight on the hard work and achievements of the sector. Universally recognised as the pinnacle of success, the Charity Times Awards really are the measure of professionalism combined with passion. The record number of entries demonstrates that the sector is in good hands, and at a time when good news about charities seems in short supply winning this accolade not only recognises an outstanding contribution to the sector, but also demonstrates the sector's vital contribution to society and we look forward to celebrating that in October."

SAVE THE DATE: 7 OCTOBER 2015

We look forward to announcing the winners at the Charity Times Awards Gala Dinner & Ceremony on the 7 October 2015 at a NEW VENUE! The Park Plaza Westminster Bridge, London. The event sold out last year so early booking is advised. Tables/seats can be booked at www.charitytimes.com/awards

2015 Shortlist:

1. Charity of the Year: with an income of less than £1 million

- CareTrade Charitable Trust
- The ClementJames Centre
- Coaches Across Continents
- Create
- Mosaic Clubhouse
- SeeSaw
- Shared Interest Foundation
- Shivia
- National Ugly Mugs Scheme
- Unseen

2. Charity of the Year: with an income of £1million - £10million

- Affinity Sutton Community Foundation
- The Albany
- Cool Earth
- Dame Kelly Holmes Trust
- IntoUniversity
- Rainbow Trust Children's Charity
- Teens & Toddlers

3. Charity of the Year: with an income of more than £10million

- Citizens Advice
- Football Foundation
- Langley House Trust



BOOK YOUR TABLE



- Leonard Cheshire Disability
- Teach First
- Samaritans

4. Best New Charity

- Bounce Back Foundation
- GO! (Great Opportunities) Together
- Mane Chance Sanctuary
- Millie's Trust
- The Silver Line Helpline
- The Teapot Trust
- Youth United Foundation

5. Outstanding Individual Achievement

- Dame Hilary Blume, Director, Knit for Peace
- Ken Dullaway, Active StreetGames Co-ordinator, StreetGames
- Les Heyhoe, Volunteer Fundraiser, KIDS
- Dame Esther Rantzen, Founder and President, The Silver Line Helpline
- Mohammad Saddique, Volunteer, Victim Support

6. Rising CEO Star

- Suran Dickson, CEO, Diversity Role Models
- Francesca Findlater, CEO, Bounce Back Foundation
- Natasha Singarayer, CEO, The Abbeyfield Society
- Toby Staveley, CEO, Yellow Submarine
- Andrew Wallis, CEO, Unseen

7. Fundraising Team of the Year

- Birmingham Children's Hospital Charity
- The Brain Tumour Charity
- Macmillan Cancer Support
- The Polly Parrot Appeal Fundraising Team
- Volunteer Fundraising Team – Cancer Research UK

8. Charity Principal of the Year

- Caron Bradshaw, Chief Executive, Charity Finance Group
- Gillian Guy, Chief Executive, Citizen's Advice

- Claire Horton, Chief Executive, Battersea Dogs & Cats Home

9. Campaigning Team of the Year

- The British Youth Council
- Cancer Research UK/Action on Smoking & Health
- Diabetes UK
- Muscular Dystrophy UK
- NSPCC
- Women's Aid

10. Best Use of the Web

- healthtalk.org
- The National Autistic Society - Ask Autism
- Stroke Association
- Target Ovarian Cancer
- Victim Support
- Young Advisors

11. PR Team of the Year: with an income of more than £10million

- Anchor
- Diabetes UK
- Electrical Safety First
- PDSA
- Save the Children
- WaterAid

12. PR Team of the Year: with an income of less than £10 million

- Alcohol Concern
- Blind Children UK
- The Brain Tumour Charity
- Create
- London's Air Ambulance

13. International Charity

- Ace Africa
- AfriKids
- Build Africa



2015 charitytimes Awards

Recognising leadership and professionalism

14. HR Management Award

- Brook
- Leonard Cheshire Disability
- Rainbow Trust Children's Charity

15. Financial Management Award

- Brook
- CHICKS

16. Social Investment Initiative

- Career Connect
- Golden Lane Housing
- Key Fund

17. Community Award

- Knit for Peace
- Missing People Charity
- Muscular Dystrophy UK
- Sova
- TimeBank

18. Fundraising Technology Award

- iBid Events
- iStreet Giving
- London Air Ambulance/Rapidata Services Plc
- PayPal Giving Fund/eBay for Charity
- Village by Village

19. Corporate Community Local Involvement

- AMAR International Charitable Foundation/Shell Iraq
- Community Links/Barclays
- Enfield Citizens Advice Bureau/Warburtons Bakery Enfield

20. Corporate National Partnership Champion

- The British Heart Foundation/Asda
- The National Autistic Society/Axcis
- Prostate Cancer UK/Keyline

- Riders for Health/Dorna Sports – MotoGP
- The Sabre Charitable Trust/Tullow Oil Plc
- The Who Cares? Trust/HBAA

21. Corporate National Partnership of the Year with a Retailer

- CLIC Sargent/Lidl
- Diabetes UK/Tesco
- Marie Curie/Superdrug
- The Prince's Trust/Asda
- Scottish Association for Mental Health/Jo Malone
- Sue Ryder/Morrisons

22. Corporate National Partnership of the Year with a Financial Institution

- Cancer Research UK/Virgin Money
- Hospice UK/Clydesdale and Yorkshire Banks
- Parkinson's UK/Credit Suisse
- The Prince's Trust/Royal Bank of Scotland
- Save the Children UK/Prudential
- Unicef UK/Barclays

23. Cross-sector Partnership of the Year

- Age UK/Zurich Community Trust
- The Dash Charity/Frimley Health NHS Foundation Trust
- London's Air Ambulance/Barts Health NHS Trust
- Macmillan Cancer Support/Coventry City Council
- National Osteoporosis Society/NHS
- The Prison Advice and Care Trust (Pact)/Public Prisons Wales

24. Corporate Social Responsibility Project of the Year

- British Gas/Shelter
- Goldman Sachs/Greenhouse Sports
- KPMG/Living Wage Foundation, Citizens UK
- MBNA/Sale Sharks Community Trust
- O2- Telefónica UK Limited/National Youth Agency
- Yorkshire Building Society - Lasting Legacy Fund



**BOOK
YOUR TABLE**



25. Best Use of Technology

- Broadway Lodge
- Euan's Guide
- Royal Albert Hall & Samsung Electronics UK
- Samaritans
- SENSE
- The WESC Foundation

26. Social Champion Award

- Caritas Anchor House
- Handmade Alliance C.I.C.

27. Investment Management

- Cazenove Charities
- Newton Investment Management
- Quilter Cheviot
- Rathbones Investment Management Limited
- Sarasin & Partners LLP

- UBS Wealth Management

28. Boutique Investment Management

- Cordea Savills – Charities Property Fund
- Heartwood Investment Management
- Impax Asset Management
- James Hambro & Partners
- Mayfair Capital
- Rothschild Wealth Management

29. Consultancy of the Year

- Foster Denovo
- International Fundraising Consultancy
- PwC
- Sayer Vincent
- Tarnside Consulting
- TSP

Tweet us if you are a finalist!

The Charity Times Awards continue to be the pre-eminent celebration of best practice in the UK charity and not-for-profit sector. For the latest news and updates follow us @CharityTAwards #CharityTimesAwards

FOR FURTHER INFORMATION AND TO BOOK YOUR TABLE VISIT: www.charitytimes.com/awards

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CORPORATE PARTNERSHIPS

Take the 'fund' out of fundraising

Jonathan Pelluet looks for the key to a successful corporate partnership

WRITTEN BY JONATHAN PELLUET, DIRECTOR OF FUNDRAISING, I CAN

As charity corporate partnerships change over time, so too do corporate fundraising programmes, rarely staying the same and often being at the mercy of the ebb and flow of internal and external factors beyond anyone's control.

Having recently joined I CAN – the children's communication charity as director of fundraising – I've been blown-away by the incredible track record of Charity of the Year partnerships (HBOS), multi-year collaborations that touched every aspect of the charity (BT and Open Reach) and new relationships that are so closely aligned with the charity's mission.

But – as with most charities who make the long-term commitment to invest time and resource in knocking on the corporate door of companies to ask for support - I CAN's corporate partnerships programme finds itself taking-stock, recognising the changes in itself, the sector and the competitive environment in which we operate.

Within the sector, you only need to look at the variety of departments who manage charity partnerships to understand the multitude of motivators that can drive companies to work with charities: CSR, HR,

marketing, executive, PR, public affairs.

And even amongst us fundraisers, it's not obvious where corporate fits. Why have one job title when you could have four: corporate fundraising/partnerships/development/account* manager sitting in the corporate and community/major giving/volunteering/high value* team. (*delete as appropriate).

AS COMPANIES GET SMARTER AND MORE DEMANDING OF THEIR CHARITY PARTNERS, CHARITIES ARE INVESTING MORE IN TRYING TO TAP IN TO THE POTENTIAL POT OF GOLD AT THE END OF THE RAINBOW

As companies get smarter and more demanding of their charity partners, charities are investing more in trying to tap in to the potential pot of gold at the end of the rainbow.

But this all shouts loudly about the dynamism charities need to adopt when looking to grow a partnership or programme. And holding on to those most dynamic and valuable





Partnerships

partnerships you've built up over the years is the biggest goal of them all.

Partnerships themselves go through phases, reacting to key staff changes, the fluctuating fortunes of the company, and as interest wanes or fundraising fatigue sets in.

But strong stewardship, dynamism, flexibility and genuine understanding are essential for these partnerships to grow and evolve, as I've often seen during my time at FareShare and Revitalise. If the focus is just on cash and lacks substance from an early stage, then the partnerships will come to a quiet end. If the commitment and skills to engage corporate partners are there, only then can real impact and innovation take hold and turn it into something really special that genuinely brings benefits to all.

Corporate volunteering is still at the heart of many charity partnerships. But long gone are the days when a 'community day' at a charity was an easy time out of the office; when the volunteers could afford to have a big night out the evening before, thinking ahead lay a day to kick back and relax. And rightly so. While fun should always be at the heart of the volunteering experience, team volunteer days are usually hard work; they can sometimes be very moving, and they can often expose those who volunteer to a side of life that might otherwise be hidden or even ignored.

At the same time, corporate volunteers can (often literally) smell a mile away those volunteer 'experiences' where the same room is painted again and again to be able to offer a 'worthwhile' team building exercise. But who can blame charities for trying their hardest to engage companies when at stake are such big potential rewards (little consolation though for those charities that can't offer them at all).

Hands-on opportunities for the

staff of a company to make a real and genuine contribution have to be sewn into the fabric of the organisation. When they are real, they make a real connection for those involved with those the charity supports, and sow the seeds for a true partnership that reaches across the business.

In all cases, it is essential

LONG GONE ARE THE DAYS WHEN A 'COMMUNITY DAY' AT A CHARITY WAS AN EASY TIME OUT OF THE OFFICE

volunteers leave in no doubt of the importance of the role they played, and be much richer for the experience.

Proving the internal case for investing such effort and manpower in some corporate partnerships can be even harder where the 'cash-prize' is not clearly in sight; where long-term commitment to cultivation, stewardship and embedding the relationship is needed to build a partnership that lasts. And these are the partnerships that can often have the biggest positive impact on those the charity supports.

As we enter the season of 'Charity Of The Year' selections, with it comes the annual – and completely justified – rush of blood to the head of the executive team or board when the six or seven figure funding pot are mentioned. But even these 'high-risk/high-return' bids seem to be slowly changing with the times to better meet the needs of both charity and the company, changing in some cases to the awkwardly worded 'Two Year Charity Of The Year Partnership', with companies recognising the fact that by the time a one year partnership has started, it's already time to plan the closing

ceremony.

With many companies, charities need to tap into all of their resources and lay bare their wares: from the compelling emotive strap-line and well-presented imagery of 'beneficiaries' through to detailed reporting of outputs and outcomes. From demonstrating what the impact of £1 will deliver through to engaging hundreds of their staff across the UK through Team Volunteer Days.

New milestones of success are also creeping in: access to new markets, numbers of 'click-throughs', 'opportunities to see'. Companies are keen to get the competitive edge and charity partnerships help.

Building that long-lasting partnership requires hard work to nurture a relationship where both parties meet the needs of the beneficiaries. By encouraging the company to care as much as you do about what you do and how you do it, we can live in hope of a successful and lucrative partnership.

We all know we have to kiss a lot of frogs to find the prince(ss). Mining the contacts of your board, colleagues, friends and family will get you part way there. But when the charity and company are genuinely aligned – when their activity, mission and values are shared – they can have a deep and profound legacy on the charity for years to come.

I CAN saw this with BT and Openreach which was a fantastic association that lasted a decade and transformed the charity at a crucial time.

My goal is to continue driving this momentum and launch I CAN into an era of new successful corporate partnerships that moves us closer to achieving our mission which is that no child should be left out or left behind because of a difficulty speaking or understanding ■

SAVE THE DATE

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DIGITAL ENGAGEMENT

The personal touch

Online channels are increasingly important for the third sector. Charity Times finds that while the medium might change, the benefits of keeping things personal remain as important as ever

WRITTEN BY ANTONY SAVVAS, A FREELANCE JOURNALIST

While traditional forms of contact such as direct mail, telephone and face-to-face remain the backbone of charities' communication with stakeholders, it is more important than ever for charities to understand the best way to engage with their donors in the new digital world.

Charities need to know what to do differently in order to tailor their messages for use online compared to more traditional channels. Generally, they have to customise communications for maximum effect when using what can basically be a broad and impersonal medium.

Getting a grip

Needing to get a grip on the online side of things is illustrated by the many digital opportunities out there, such as the new Storm ethical search engine, which allows consumers to raise money for their favourite charities as they shop online.

Storm shares commissions on purchases made via its 'Give' icon displayed alongside listings for participating retailers on search results pages. WellChild, the national charity for sick children whose patron is Prince Harry, is already on board with the service. Storm reckons it could eventually raise £200 million for UK charities each year.

Getting it right

Stephen Lee, Professor for voluntary sector management at the Cass Centre for Charity Effectiveness at Cass Business School, says: "Given the multitude of traditional and online channels available, there is a major opportunity for charities to engage new and existing stakeholders, but as with any communication there are risks.

"Before embarking on any digital campaign, organisations need to take a step back and develop a proper strategic plan."

He says the plan should include

details about the purpose of the communication - what it aims to achieve, who is being targeted, how it will be measured and what is the most appropriate channel to use.

"To resonate with people, a good digital communication must be interactive, but the challenge for charities is being able to respond quickly to people and then to look after the new relationships created," says Lee. "There is nothing worse than an organisation using an online communication to engage people, promising something and not following through."

Lee warns however that digital communication might not always be the best medium to use. "Sometimes there can be pressure for everyone to be doing everything digitally, but this pressure can often come from consultants who make their living selling digital services."

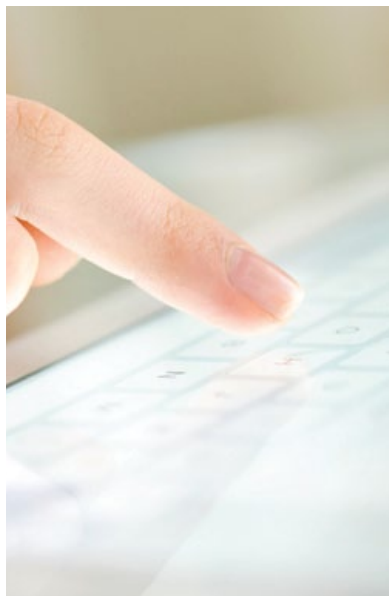
He warns: "It all comes back to the planning and if in any doubt, don't do it."

Stop the hounding

Jason Lark is managing director at Celerity Information Services. The company works with charities including Marie Curie, CRUK, National Trust and Oxfam, helping them to improve donor relations and generate more revenue from donor data.

Lark says: "The key is to stop online communications - and any other marketing for that matter - from being a broad and impersonal medium. Charities are lucky to have loyal supporters that aren't adverse to frequent communications, but no-one wants to be hounded."

He says online supporters should be offered preference setting options on sign-up and asked to confirm their contact preferences with a follow-up email. "It's more important than ever that brands ditch



the mass email campaigns and instead focus on targeted online communications,” Lark says.

Digital personas

In recent research, Advanced NFP (part of Advanced Business Solutions) looked at “digital personas”, the demographics of a donor or supporter when online in their various guises, whether on LinkedIn at work or Facebook at home with friends, for instance.

Advanced NFP’s commissioned research involved 350 charities and not-for-profit organisations, and considered whether charities are recognising the opportunity with digital personas.

The research showed that whilst the majority claimed to understand the concept of a digital persona and that 78 percent of organisations recognised they should be doing more to build individual profiles of their supporters, most admitted they aren’t doing anything to understand them better and are predominantly relying on direct interactions to build profiles.

Simon Fowler, managing director of Advanced Business Solutions, says: “With statistics showing that consumers are increasingly shopping online and mobile banking recently taking over as the preferred route, it seems logical that charity giving is set to follow suit – text and mobile giving are two of the fastest growing areas.

“The only problem is, with the contact explosion of social channels and one person having potentially several different personas – from their work email through to purchasing on Amazon - charities must appeal to and interact effectively with them all.”

Tracking the donors

Data intelligence agency REaD Group has partnered with Macmillan

Despite the obstacles to a successful digital strategy, Hannah Attenburrow, marketing officer at UK children’s charity Dreams Come True, told *Charity Times* the organisation is effectively using a small budget to make the most of social media.

The charity aims to fulfil as many dreams as possible for children and young people with life limiting illnesses. Attenburrow says: “The digital era has given us an extremely cost effective method to enable us to communicate with our stakeholders in a timely, personalised way and most importantly at a time when they want to interact with us.

“To do this we primarily use social media to engage with our fundraisers and key stakeholders. The most effective method we believe is to have an integrated digital approach where our social channels are used alongside our blog and PR to inform and celebrate what the charity and our fundraisers have been up to.”

Charity ambassadors are also used to drive engagement. During Dream Tea Week, the charity’s annual fundraising campaign where supporters host afternoon teas and donate proceeds to Dreams Come True, the charity worked with celebrity baker Miranda Gore Browne to host a “Twitter takeover” where people asked her baking questions.

This increased engagement with existing followers but also attracted new users to the organisation’s social pages. As not everyone has a Twitter account, the charity also allowed people to email their questions in too. All the answers were posted on the organisation’s blog which had the added benefit of driving traffic to the website.

“Charities also shouldn’t forget about Facebook advertising,” Attenburrow says. “Used in the right way it can be a key part of referral marketing campaigns and can increase the number of referrals as well as online engagement. It is a brilliant resource for charities as the budget can be set accordingly to the campaign, and it’s easy to monitor and tweak in line with what your trying to achieve.”

THE KEY IS TO STOP ONLINE COMMUNICATIONS - AND ANY OTHER MARKETING FOR THAT MATTER - FROM BEING A BROAD AND IMPERSONAL MEDIUM

Cancer Support and Maggie’s Cancer Caring Centres to develop data marketing technology.

Scott Logie, managing director of REaD Group Insight, says: “Data specialists don’t consider online and offline as two separate channels, they focus on the individual. The tricky part of communicating with people in the virtual world is that we

can only use information they’ve chosen to share with us, information that is often not enough to effectively market to them.

“The way to solve this is to create links between the online and offline world, so that offline information can contribute its demographic detail to online behavioural information, building a digital persona of each recipient.”

Logie says charities should explore how direct distribution campaigns, such as door drops or email, can be supplemented with online targeting. In the same way an advert can be posted through a person’s letterbox or arrive in their inbox, it can also appear on their favourite website, or be targeted at them and

The internet and digital engagement opportunities

Google Ad Grants

Google Ad Grants is the non-profit edition of Google's online advertising tool AdWords. This grant allows charities to advertise on Google search results pages for free. Charities have \$10,000 per month to spend on ad clicks, with a maximum cost-per-click of \$2.

RLSAs

Remarketing Lists for Search Ads (RLSAs) is an option within the Google Ad Grant account. Customised text ads can be shown within Google search result pages, to people who have previously visited your website. If a user visits your site without donating for example, you can target those people while they search on Google to help encourage them back to the website and donate.

Ad Extensions

Google Ad Grants allow ad extensions, such as Sitelinks, location extensions and Call extensions, to be included in search adverts. These can help drive more traffic to your website, allow local people to find your charity and encourage people to get in touch.

YouTube Non-profit

The YouTube Non-profit Programme offers charities the chance to engage with YouTube users by showcasing charity missions, fundraising events or success stories. A Google Wallet "Donate" button can be added to your video.

Google Display Network

Charities can also make use of display advertising on the Google Display Network (GDN). Banners, text ads and click-to-play video ads can be used to target visitors on related

websites or users who have relevant interests.

Search Engine Optimisation (SEO)

SEO enables charities to be found online by helping them "rank" on search engine results pages for particular search terms. Think "clean water Africa" or "child poverty UK" – if your site ranks for these terms, you'll be the first thing people see when they type them into Google.

Content marketing

Content marketing goes hand in hand with SEO – it's another means of getting your charity, and its message seen online. Content marketing is the creation and distribution of valuable, relevant and consistent content (such as blog posts, videos or games) in order to attract a clearly-defined audience and drive a particular action.

One of the best recent examples of a content-driven charity marketing campaign is the "one second a day" video produced by Save the Children, which showed viewers what an average English girl's life would look like if London experienced a conflict similar to that taking place in Syria – the video has had approaching 50 million views.

Social media

Social media gives you a direct channel of communication with your supporters, but the thing to remember with social media is that it's a two-way conversation. Keep your followers up to date with what you're doing, share photos, stay relevant and provide them with content that they're likely to find interesting.

Once you've done this, you've got a captive audience when the time comes to ask them to donate or to help you spread your charity's message.

Source: Liberty Marketing

similar individuals through Facebook or other social sites.

This tactic can be achieved by building connections between personal information (such as address or email) and cookie data from devices after permission is given by individuals. This connects persona and demographic information with behavioural data.

User-generated content

Andy Mallinson, European

managing director of Stackla, a social content curation platform, says: "Social media holds huge potential for charities when it comes to driving customer engagement and donations. When an individual makes a donation or supports a cause, they often share this on social media, perhaps via an Instagram photo or a Tweet.

"This user-generated content (UGC) should be harnessed and amplified by the charities

themselves. After all, people tend to implicitly trust insight from peers, much more so than material they receive from brands."

He says charities can incorporate UGC within "dynamic re-marketing advertising". When would-be donors are browsing online, they can be served-up dynamic socially-powered ads from that particular charity, with the ability to click-through and donate ■



charitytimes

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In their own words...

Sector personalities' comments on the topics affecting the charity space

On new figures showing charities are not sharing in the economic recovery

"Many charities have demonstrated considerable success in growing their earned income from individuals, and we should celebrate this. But we also have to remember that charging fees for services is by no means a practical or sustainable option for all. Quite simply, cuts to public service contracts mean that charities can do less for those they exist to support."

NCVO chief executive Sir Stuart Etherington

On grant making

"It is encouraging to see that despite the financial crisis and recent recession, the total actual value of grants is returning to pre-recession levels. However, the finances of grant-making trusts and foundations are likely to come under more pressure as further cuts in public spending are implemented. The knock-on effect of cuts in statutory funding may force foundations to re-evaluate their strategic priorities and how they support their beneficiaries in the future"

DSC head of research Tom Traynor

"To navigate the next five years, charities will need to show considerable financial leadership, investing time and resources in understanding their business models and identifying risks and opportunities."

**CFG chief executive
Caron Bradshaw**



On fundraising

KEVIN TAYLOR

Storm CEO

"The UK is one of the world's most generous nations but increasingly aggressive tactics are threatening to create a 'donation deficit' where the amount we donate to charity actually decreases. Consumers are saying they want easy, non-intrusive ways to incorporate charitable giving into their everyday lives."

ADRIAN SARGEANT

Director, Centre for Sustainable Philanthropy at Plymouth University

"The level of government interest in our sector has never been higher, so this must be the time to push for and achieve meaningful change that would benefit fundraisers, charities and the public alike. At the very least as a profession we should have a vision for the system of self-regulation we would like to see and a strategy for how exactly we are going to achieve it."



"The government thought it was the right thing to do to give this charity one last chance of restructuring to try and make sure it could continue its excellent work."

Prime Minister David Cameron

On Kids Company

SIR STEPHEN BUBB

ACEVO chief executive

"As council social care is cut to the bone, Kids Company was a major player in town. The social consequences of their demise are catastrophic for the individuals concerned and costly to the exchequer. Yet it would compound the catastrophe if criticism of the decisions by government on the funding of Kids Company caused government ministers to micromanage charities with which they work, or out of fear, overlook them altogether."

CAMILA BATMANGHELIDJH

Kids Company founder

"That's it, it's the end of Kids Company. And actually a bunch of rumour-mongering civil servants, ill ... spirited ministers, and the media on the back of a range of rumours, put the nail in this organisation and shut it"



On the first Big Society Capital investment to pay back

NICK O'DONOHUE

BSC CEO

"This is the first Big Society Capital investment to be repaid and illustrates how charities and social enterprises can successfully use social investment as a tool to generate additional funding and increase their impact."

PETER CROWNE

Scope director of finance

"We have watched the social investment market grow over the last few years and it is great that we can tell the story of what it has achieved and that we have paid it back."

On the lobbying act

"Charities and community groups play an important role in getting people involved in civic action and local democracy. I'm not sure what examples there are of charities unduly influencing elections but they must be so rare they could be dealt with individually rather than this blanket legislation."

NAVCA head of public affairs Barney Mynott

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LEGAL COMMENT

Legal comment: Kids Company

Two sides of the coin and the changing landscape of the charity sector

WRITTEN BY SARA SAYER, DISPUTE RESOLVER AND HEAD OF
THE CHARITIES TEAM AT BIRKETTS LLP

The travails of Kids Company and the associated media maelstrom over recent weeks serves to illustrate how the charity sector has changed over recent years.

Whilst the real story about Kids Company is yet to be known (as both sides strongly advocate their opposing positions), it highlights a perennial tension for charities. Be criticised for spending too much money on administration and not on the service users/beneficiaries, or for spending too much money on service users/beneficiaries and not enough on administration. The latter being an allegation levelled against Kids Company.

On the one hand - you have the camp that advance the bravery of a founder prepared to stand up to the Government's funding cuts. To others it is a textbook case of many of the concerns encountered in the modern-day charity setting. These include 'founder's syndrome' - someone who loses the ability to stand back and view things objectively; perhaps unable to cut the apron strings as the bird fledges and wants to leave the nest and explore new territories. In Kids

Company's case, the founder appeared to admit on Radio 4 that the charity did not have any reserves and lived hand to mouth, seemingly relying on "cups of tea" with stakeholders and potential funders - all of which for a charity that size was unsustainable. Strong financial planning and securing income streams should have been a core part of its strategy and operations.

CHARITIES ARE SIMULTANEOUSLY EXPERIENCING BOTH FUNDING CHALLENGES AND GREATER COMPETITION AS THEY BID AGAINST EACH OTHER FOR FUNDING AND CONTRACTS

Many mainstream charities have significant incomes, even comparable to large corporates that need managing in a business-like and efficient way. Gone are the days of a CEO being entitled to say their organisation does not have a

strategic business plan because it is a 'charity'. Moreover, the senior management team and board should expect scrutiny of their actions and be in a position to justify those actions, especially if in receipt of public money. Those charities with a unilateral "board knows best" mentality may struggle; successful charities are those that engage with their stakeholders and think about issues from different perspectives. User and, indeed, non-user surveys need to be more commonplace. Risk management needs to permeate all aspects of a charity's strategy and operations.

The changing landscape of the charity sector

Sector - The boundaries between Government, the private sector and the voluntary sector are increasingly blurred. The charity sector has grown, due to less state provision and the promotion of the "Big Society". Charities are simultaneously experiencing both funding challenges and greater competition as they bid against each other for funding and contracts and as charities both commission and procure to deliver services. Contracts demand more for less or, at least, more for the same money.

Beneficiaries - Beneficiaries are on the sharp end of realising there is less state provision. Society's demographics constantly evolve; we have a greater number of older people, we are more disparately distributed and the older generations tend to live distances from families and traditional support structures. Studies evidence the epidemic of loneliness plaguing all ages but especially the elderly - hence the emergence of charities such as Silver Line.

Comment

Supporters and donors -

Individuals are giving differently. While individual donations are increasing, there is also a shift from “cash to kind” - people giving resource more than money. In addition to the altruism of old, is the concept of an “exchange relationship” where the donor receives something in return. On an individual level, the millennial generation are lending and not just giving time and money. On an institutional and corporate level, we have seen the advent of the corporate social responsibility culture, through to the materialisation of social impact and the measuring of outcomes and KPIs. The way supporters give their time is also changing. People may give shorter and less regular amounts of time through formal programmes such as Timebank or via informal ‘pop up’ giving mechanisms, such as, Twitter campaigns.

Structure and operations - The sector has changed on a number of fronts. There is now an emphasis on early intervention and the targeting of resource to influence lifestyles and behaviours to avert the onset of illness or disease.

Formal structures and institutional relationships can be bypassed. The disruptive power of the internet and social media means that there is now a 24/7 media landscape with the consequent increased scrutiny to be managed. Two-way dialogue means that the charity does not have the last word, but needs to respond to comments and interact with people who have elected to engage with it.

Internet campaigns run by 38 Degrees deluge MP's offices with automated emails but these still need answering! Petition sites can have a mass impact, including Care2 which garnered more than a million global signatures in under a week influencing Zimbabwe's (seemingly



temporary) decision to suspend hunting around its biggest game reserve after the slaughter of Cecil the Lion.

The internet easily facilitates crowd funding. This is being used for funding medical treatments, social enterprise, stand-up comics at the Edinburgh fringe and community challenges to planning decisions to name a few examples.

Regulation - At a time when there is a societal urge and imperative to do things differently, the traditional source of guidance and friend to the sector, the Charity Commission, has seen its funding cut significantly. Accordingly, the Charity Commission has had to restructure and has moved from being a friend, to what the CEO Paula Sussex describes as an 'enabler'. Others would say it is more of an enforcer and regulator. The Charity Commission admits a renewed emphasis on compliance, including a role to deal with mismanagement, and monitoring of charities, in a period when trust issues have come to the fore. Trust and conduct rose to the top of the media agenda in the wake of the death of the fundraiser Olive Cooke and the ensuing investigations into fundraising practices. When coupled with the unmasking of abuse by some of charitable status the charity sector can be said to be experiencing one of its toughest tests in public confidence.

Trustees - The Charity Commission has also focused on getting charity trustees in better shape. It has encouraged a move away from "pale, male and (some would say) stale" trustees, to a board that reflects the diversity of a charity's service users and beneficiaries. Ideally it would include some of the latter on the board. A skills and cultural change amongst charity trustees is advocated so that boards

EVERYTHING A CHARITY DOES SHOULD COME BACK TO WHETHER IT FULFILS THE CHARITY'S OBJECTS: THE VERY REASON WHY IT EXISTS

cover the various disciplines necessary for strong governance. These range from HR, to legal, fundraising, finance, to marketing and business development.

This helps with the commission's desire to "enable" trustees so that they perform a role of scrutiny, imbued with a mind-set of challenge and ideas. Trustees should not be there simply to just rubber stamp the decisions of a charity's management team. This change of approach, arguably, helps to counterbalance the commission's loss of resource and may also be construed as a manifestation of the Big Society in action; the empowering of communities and self-regulation.

At the same time, conflicts of interest (a recurring theme in Charity Commission case reports) are on the agenda. Conflicting interests are not necessarily eliminated but, instead, are registered and dealt with in a far more transparent and accountable way than in the past.

Overall, charity trustees should be the stewards of the charity, focusing on strategic issues rather than operational concerns (on which the staff should lead), to help charities survive choppy waters and be in better shape for the future.

Lessons

A long hard look needs to be taken at the Kids Company case to see what lessons can be learned. Governance issues, strategic and financial plans and the viability and

transparency of those plans need to be examined including in the context of the role of charity trustees.

Everything a charity does should come back to whether it fulfils the charity's objects: the very reason why it exists. An assessment should be carried out as to whether a proposed decision/action makes life better for the charity's service users and beneficiaries. This requires a sound strategic and financial plan to ensure that the charity survives and prospers, to provide for its beneficiaries and service users, both now and in the future.

Finally, let's not lose sight of the fact that a huge number of people are doing good work in the charitable sector; paid and unpaid. As the American anthropologist Margaret Mead said in the 1960s: "Never doubt that a small group of thoughtful, committed citizens can change the world; indeed it's the only thing that ever has". Giving it the benefit of the doubt, Kids Company, as its name implies, was set up for the kids. Its founder argues that it served a purpose and bridged the gap between state provision and user need at a time when support was required more than ever. Now charities and other services are going to have to step in and plug the gaps unless service users are to be just left to fend for themselves. The situation could, perhaps, have been managed earlier by the adoption of more efficient business and financial practices. Potentially, greater collaboration with like-minded organisations could have resulted in the use of shared services, thereby reducing costs. Such an approach is not at the expense of, but for the benefit of, the children. This is because it may mean a charity remains sustainable while providing a structure through which immediate problems can be addressed ■

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