



the association of
charitable organisations

ACO ANNUAL CONFERENCE

EMBRACING CHANGE

WED 27TH SEPTEMBER 9-6PM
30 EUSTON SQUARE, NW1 2FB

SPONSORED BY **evelyn**
PARTNERS

WELCOME TO OUR 2023 ACO ANNUAL CONFERENCE

I'm delighted to welcome you to what is the keynote event in our annual ACO calendar - that brings with it the opportunity to reflect on the sector, renew acquaintances and perhaps build some new relationships along the way!

This year's conference theme is "Embracing Change: How Innovation is Transforming Financial and Well-being Support" reflecting the significant changes we've seen in the way charities operate. Whether they've been driven by global events (Covid), the economy, technology, demographics or indeed other factors I think we can all agree that staying static is not an option and that these changes have allowed charities to innovate and in some cases re-imagine how they support their communities.

During the course of the day we'll cover a range of themes around "change": discussing how digital has impacted the sector (and how we mitigate the digital divide); looking at the opportunities that leveraging data more effectively can provide; showcasing how collaborative partnerships can deliver more than the sum of their parts and highlighting charities that have re-modelled their financial/wellbeing support models.

We close the programme with a timely panel conversation around the impact of flexible working on the charity business model - what it means for the charities themselves and what the expectations are for both existing employees and also those candidates looking to enter the sector.



We're obviously excited to close out the conference with our 2023 Annual Awards ceremony. In its third year, the Awards provides a tremendous platform to celebrate the achievements of organisations and individuals across the ACO network. We have had some tremendous nominations (as always) and look forward to announcing worthy winners.

A final word of thanks to our Conference sponsor - Evelyn Partners - and Awards Sponsor - Family Fund Business Services - for their invaluable support in enabling us to bring this event together and to all our exhibitors on the day, please give them a visit!

Donal Watkin, Chief Executive



A WORD FROM OUR SPONSOR: EVELYN PARTNERS

Evelyn Partners are delighted to partner with the Association of Charitable Organisations for your 2023 Annual Conference.

‘Embracing Change’ is a truly appropriate theme from our perspective as we have recently celebrated the one-year anniversary of our new name: Evelyn Partners which we chose following the merger of Smith & Williamson and Tilney BestInvest. Despite this change, we retain our historic dedication to the charities sector and to providing senior leaders and trustees with the information they need.

We manage over £3.2 billion in charity investments for more than 1220 charities across the UK. Our charity clients are all shapes, sizes and sectors. They ask us to preserve their capital against inflation, grow their assets, create income and align their portfolio with their mission and ESG objectives.

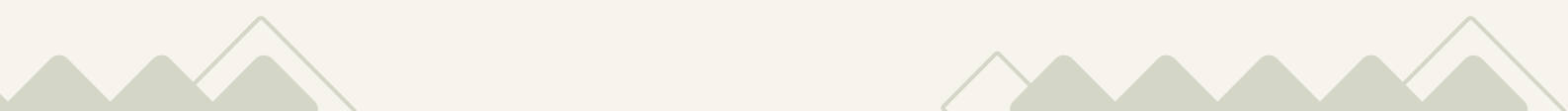
Today we are sharing our thoughts on the practical application of integrating your ESG and responsible investment principles with your investment objectives. It seems everywhere you look charities are being inundated with information about responsible investment and warned of the perils of inadvertently greenwashing, but few are given a practical guide on how to approach the subject.

ESG investing is largely subjective and should be entirely bespoke to your charity’s needs. So please forgive us if our guidance today is broad. Please know we are always available to answer your questions. You need only ask. Until then, thank you for inviting us to participate today. We look forward to learning with you.

For more information please contact Caroline Gee at Caroline.Gee@Evelyn.com Gerry Wright at Gerry.Wright@Evelyn.com



evelyn
PARTNERS



Treating your charity with the extra care it deserves.



We are proud to sponsor the ACO's annual conference

Investing for your charity is about more than just aiming to generate good returns. By understanding the investment demands of your charity, its mission and financial goals, we can build a bespoke portfolio just for you. One that considers your risk tolerance, accommodates ethical requirements and reflects your own values.

Evelyn Partners has been supporting charities for almost 200 years and our dedicated team understand the challenges faced by charities and the obligations of trustees.

www.evelyn.com

To find out more, please contact:

Caroline Jarvis Gee
Head of Charity Business Development -
England and Wales,

E: caroline.gee@evelyn.com

T: 020 7131 8403

Evelyn Partners Investment Management LLP

Investments go down as well as up and you may not get back the amount invested.

Evelyn Partners Investment Management LLP is authorised and regulated by the Financial Conduct Authority. Services may be provided by other companies in the Evelyn Partners Group

PROGRAMME

EMBRACING CHANGE



SCAN ME

9.00-9.30am

Registration

9.30am

Introduction: Donal Watkin, Chief Executive, ACO

9.45am

Sponsor Introduction: Emma Moffat, Investment Manager, Evelyn Partners: What does an ESG screened portfolio actually look like?

10.10am

Navigating Change: Will Digital Innovation Reshape the Charity Sector?

- **Chair:** Jonathan Chevallier, Chief Executive, Charity Digital
- Ren Yi Hooi, Chief Executive, Lightning Reach
- Jodie Gill, Chief Operating Officer, caba
- Isobel Thomas, Head of Community Engagement and Experience, Good Things Foundation
- Alison Davies – Head of Service Development and Delivery, Family Fund

11.00-11.20am

Break

PROGRAMME

EMBRACING CHANGE

11.20am

Breakout Session: Current Issues in Financial and Well-being Support

12.00pm

The Power of Data: Delivering Transparency and Best Practice

- David Locke, Director of Finance and Operations, RABI
- Tania Cohen, Chief Executive, 360Giving

12.30pm

Lunch Buffet

13.30pm

Collaboration Spotlight: Fostering Partnerships and Building Relationships

- Manjeev Muker, Individual Grants Manager, Longleigh Foundation & Anne-Marie Bancroft, Principal Consultant, Altair
- Lionheart & Nudge, Jo Grant, Training and Wellbeing Project Development Manager, Lionheart & Sajid Mannan, Account Director, Nudge

PROGRAMME

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- Access Social Care Presentation, Kari Gerstheimer, Chief Executive, Access Social Care
- Update from EDI Group, Joe Howes, Chief Executive, Buttle UK & Alison Wyman, Chief Executive, Actors Benevolent Fund

14.30pm

Navigating Tomorrow: Evolving Financial and Well-being Support

- Sarah Davies, Director of Charitable Services, Clergy Support Trust
- Sarah McLoughlin, Director of Programmes & Partnerships, Turn2Us & Jules Tompkins, Head of National Grants Programme, Turn2Us

15.10pm

Break

15.20pm

The New Normal: How Charities are adapting to a flexible working culture

- **Chair**, Claire Campbell, Consultancy Director, Timewise
- Jane Petit, Chief Executive, Foothold

PROGRAMME

EMBRACING CHANGE

- Flavia Gapper, Director of Help, Advice and Service, Charity for Civil Servants
- Stuart Milliner, Head of Merrifield Consultants, Merrifield Consultants

16.05pm

Closing remarks and short break

16.20pm

ACO Annual Awards 2023

17.00pm

Drinks Reception

18.00pm

Close

OUR SPEAKERS



Jonathan Chevallier is a charity and commercial business leader experienced in guiding transformations for digital and technology organisations. As CEO of Charity Digital he has led the organisation to become the largest contributor of advice and content on digital matters to the not-for-profit sector.



Isobel Thomas, Head of Community Engagement & Experience at Good Things Foundation. Isobel has over 15 years experience of developing and supporting charity sector organisations and partnerships and cares about equality and community and how digital can change lives.



Ren Yi Hooi is the Founder and CEO of Lightning Reach, a financial support portal which makes it easy for people to find and apply for a wide range of personalised support in one place - while enabling charities to increase their reach and streamline their grant administration process.



Jodie Gill is Chief Operating Officer at caba, an occupational charity supporting the ICAEW community with everyday and exceptional life circumstances. Joining the third sector in the early 2000's, Jodie has held a number of senior level roles within membership and charity. Before embarking on her journey in the third sector, Jodie garnered invaluable commercial experience within blue chip companies and professional service firms.

OUR SPEAKERS



Alison Davies is the Head of Service Delivery & Family Contact at Family Fund. Alison has led the development of Family Fund's Service Delivery and Family Contact Department at Family Fund for the past six years. The department is responsible for the holistic support to families during the application process through query resolution and a suite of Information and Support (IaS).



David Locke is Director of Finance and Operations at RABI (The Royal Agricultural Benevolent Institution). David's career has taken in roles at KPMG, EY, Oxford Diocesan Schools Trust, Brighter Futures for Children, the Baptist Union of Great Britain and BMS World Mission. He is a chartered accountant, holds an international qualification in information technology and is a fellow of the Royal Society of the Arts. He is Chair of the CAF Pension Scheme and a Governor at Spurgeon's College in London.



Tania Cohen leads 360Giving and oversees the delivery of their strategy and operations. Prior to joining 360Giving in March 2020 she had been working and volunteering in charities and grantmaking organisations for over 20 years, including roles as an analyst supporting organisations to improve performance.

OUR SPEAKERS



Manjeev Muker spent a few years fundraising for both the Carers Trust and Carers UK. An interest in grant making saw him a step into the sector and into the role of Individual Grants Officer at Longleigh, after a year as a Grants Assistant at the Mercers Company. He is now the Individual Grants Manager and oversees all aspect of grants to Stonewater customers.



Anne-Marie Bancroft is Principal Consultant at Altair and leads the research funded by Longleigh Foundation in respect of the Provision of Floor Coverings in Social Housing. Anne-Marie comes from working within the social housing sector including working directly with tenants who have experienced a lack of floor coverings.



Jo Grant is Training and Wellbeing Projects Manager for LionHeart, the charity for RICS professionals. With a background in physical health and wellbeing, she joined LionHeart in 2016, with an original brief to lead on a major mental health project. Having embedded that successfully into LionHeart's service offer and work with firms, she now has a wider focus on developing proactive wellbeing services.



Sajid Mannan looks after the customer proposition at nudge, the financial wellbeing company. Sajid's role is to understand the need for organisations to help their members better understand and manage their money. Over the last 2+ years, he has successfully built out this new proposition, which now supports thousands of people across the UK.

OUR SPEAKERS



Joseph Howes has been Chief Executive of Buttle UK for five years and has previously held senior fundraising, and communications roles at Depaul UK, Action for Children and The Prince's Trust. Joseph has 23 years of experience working in charities supporting children, young people and their families in the UK to build better futures.



Alison Wyman has 20 years experience working in the charity sector, developing and managing services and programmes to support people going through challenging times. In July 2023 Alison joined the Actors' Benevolent Fund as their first CEO, and she is also a trustee of the ACO.



Kari Gerstheimer is the CEO and Founder of Access Social Care. She has worked in the charitable sector since 2006 . Kari qualified as a Solicitor in 2003 and has an LLM in Human Rights Law. She set up a beneficiary facing legal department at Sense.



Sarah Davies, Director of Charitable Services, Clergy Support Trust. Sarah is responsible for all aspects of the Trust's charitable activity, including grant-making, partnerships and support services. Her role includes designing and delivering on strategic priorities which meet the needs of clergy households.

OUR SPEAKERS



Sarah McLoughlin joined Turn2Us in November 2021 after 4 1/2 years at Nesta, the innovation foundation, where she managed a range of national grant programmes. These included the Savers Support Fund, utilising social action and community engagement approaches to increase financial resilience.



Jules Tompkins has almost 20 years experience in the charity sector and has spent much of her career working in grant-making and social investment. Jules has experience managing public funds alongside roles in the Trusts & Foundation sector. Jules joined Turn2us in 2021, taking over as the Head of National Grants in October 2022.



Claire Campbell is a flexible working and job design expert and jointly leads the Timewise consultancy team. Recently, Claire has worked extensively with local authorities and the NHS, as well as a wide range of private sector and frontline organisations. She oversees many of Timewise's larger consultancy projects and innovation programmes.

OUR SPEAKERS



Jane Petit is the CEO of the global charity Foothold, The Institution of Engineering and Technology Benevolent Fund, which strives to increase the well-being of engineers and their families worldwide. Formally a nurse and working with national and local charities since 2000, one of Jane's key strengths is matching the needs of the community she is serving with the aspirations of funders and developing solutions that support both.



Flavia Gapper is Director of Help, Advice and Services at the Charity for Civil Servants. Her background includes heading up information and advice teams in charities, managing contracts, helplines, partnerships, teams and projects. Previously, Flavia was Centre and Partnerships Manager for a Centre of Teaching and Learning Excellence in Human Rights.



Stuart Milliner acts as Head of Merrifield Consultants and has been a part of the charity sector for 12 years, recruiting into the sector for 7 years. When recruiting, he specialises in senior appointments for charities and other not-for-profits. Stuart focuses on Fundraising, Marketing and Communications and Office Support/HR roles.

OUR EXHIBITORS

THE OT PRACTICE



The OT Practice is an independent Occupational Therapy company specialising in providing expert clinical occupational therapy services nationwide to private individuals and charities.

Ethics are at the heart of our vocation as health care professionals, and it is an ethos we actively instil throughout all areas of the business, not just our clinical team.

Since founding The OT Practice, we have grown to become the largest team of occupational therapists in the UK containing some of the country's leading clinicians. Our nationwide team delivers outstanding care and have extensive experience working with charitable organisations to provide assessments and reports to support grant-funding applications.

We pride ourselves on our reputation for building long lasting and trusted relationships as the Occupational Therapy provider for a number of the UK's most established and trusted charities.

Ian Charlton
Business Development Director

Gary Watts
Client Relationship Manager

SCOTSCARE



ScotsCare provides comprehensive support for all first- and second-generation Scots and their children in and around Greater London; ScotsCare offers help through a variety of financial, practical and emotional support, including financial grants, advocacy, job coaching, counselling, sheltered housing, homelessness support, social events and family support.

The charities aim is to break the cycle of deprivation experienced by some Scots by giving them the tools they need to improve lives. It could be supporting a family with children's clothing grants, or offering an older Scot a flat in their sheltered housing properties.

For over 400 years it's been a shoulder to lean on for Scots away from home, evolving with the times into a modern organisation, adapting, improving and adding services to best fit the present day needs of its clients.

Visit www.scotscare.com to find out more.

Pete Bakewell
Communications Officer

OUR EXHIBITORS



360GIVING

360Giving's aim is to provide a more informed understanding of the UK grantmaking picture, so that more money goes where it is needed most to support communities and good causes.

We do this by helping UK funders publish their grants data in an open, standardised way, and by supporting people to understand and use this data to improve charitable giving.

We support funders to publish their data using the 360Giving Data Standard. This enables them to share information on who, where and what they fund in a way that others can access and use for free.

To help people to access and use the data, we have also created tools to make it easy to explore, download and visualise. Because the data is standardised, it can be looked at and analysed all together, helping us to see and understand grantmaking across the UK.

We've now supported hundreds of funders to publish their grants and become a part of the open grants movement.

Tania Cohen
Found and CEO

ACCESS SOCIAL CARE



Access Social Care (ASC) is a specialist health and social care advice providing charity. ASC connects their expertise to other organisations via a membership model and a legal information on-line product that is available for advice seekers 24/7 and creates personalised legal letters to help people improve health and social care outcomes.

We highlight the gap left by cuts to Legal Aid and provide advice for those who can't afford it. With a 98% success rate, our network of lawyers and barristers ensure fair access to justice when things go wrong. We collaborate with social services whilst ensuring legal obligations are met.

Access Social Care is:

- Delivering free legal support so we all get the social care we have a right to.
- Providing access to a network of solicitors and barristers.
- Highlighting the gap left by Legal Aid to ensure access to justice.
- Working with communities and public bodies to uphold the rule of law.
- Shaping a future where social care is adequately funded.

Kari Gerstheimer
Founder and CEO

ACO ANNUAL AWARDS

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Business
Services

FFBS Bio - Family Fund Business Services (FFBS) makes grant administration simple. By providing charity clients with one point of access to thousands of essential products we take the hassle out of sourcing items and managing multiple suppliers. With ten years' experience of distributing essential items directly to beneficiaries, we understand the needs of vulnerable households.



Family Fund beneficiaries using grant item.

How does it work?

Clients place orders through our unique online ordering portal, which are then fulfilled by our supplier network and delivered directly to the beneficiary. Our portal is designed to make distributing vital support easy, giving access to a wide range of essential items including white goods, furniture, energy vouchers, cash-out and food vouchers.

Why choose FFBS?

Owned by a charity ourselves we understand the difficulties of trying to meet increasing demand in a landscape of higher prices and lower funding. With one consolidated monthly invoice, and pooling our buying power, we hope to make your funding go further. And every pound spent with us results in additional support for families nationwide as any profit generated is gifted to our parent charity, Family Fund.

100% of our clients said they were satisfied or very satisfied in our latest customer satisfaction survey. Why not get in touch today to find out how we can help you distribute support to people in need? Email: businessdevelopment@familyfundservices.co.uk

FFBS Quote – “FFBS are proud to be the sponsor of this year’s ACO Annual Awards, celebrating the achievements of charities and individuals across the ACO network who are making a difference every day. Supporting a charitable cause is what we do at FFBS and we are really pleased to be a part of recognising those who are working tirelessly to help people during these challenging times.” (Mary Alcock – Head of Client Relationships)

ACO ANNUAL AWARDS

SHORTLISTED CHARITIES

🏆 Small charity of the year

- Pharmacist Support
- Teaching Staff Trust
- The Royal Theatrical Fund

🏆 Charity of the year

- Chemists Community Fund
- Clergy Support Trust
- NewstrAid Benevolent Fund

🏆 Outstanding contribution

- Jennifer Golan at The Stock Exchange Benevolent Fund
- Sharon Lomas at The Royal Theatrical Fund

🏆 Campaign of the year

- Royal Agricultural Benevolent Institution (RABI)
- Pharmacist Support
- Buttle UK

🏆 Commercial collaboration of the year

- Foothold
- Merchant Navy Welfare Board
- ScotsCare

🏆 Charity collaboration of the year

- Buttle UK + Smallwood + Turn2us
- Barnwood Trust, Buttle UK, Caba, The Family Fund, Glasspool Charity Trust, The Licenced Trade Charity, National Benevolent Charity, The RAF Benevolent Fund, The Solicitors Charity and Teaching Staff Trust.
- Merchant Navy Welfare Board

🏆 Impactful grant of the year

- Hospitality Action
- ScotsCare
- Royal British Legion

