



the association of
charitable organisations

ACO ANNUAL CONFERENCE

18 SEPTEMBER 2025
BMA House, London

**RESPONDING TO NEED:
THE EVOLVING ROLE OF
CHARITY SUPPORT**

Sponsored by:

CCLA
GOOD INVESTMENT



The Brand and Digital agency for
Charity, Health & Education.

WELCOME TO OUR 2025 ACO ANNUAL CONFERENCE

I'm delighted to welcome you to ACO's keynote event of the year – bringing with it the opportunity to once again reflect on some of the key issues impacting charities providing financial and wellbeing support – alongside renewing and building sector connections along the way!

In the current economic landscape, our charities are often facing the dilemma of balancing demand for short emergency/crisis support from their audiences with looking to meet provide more strategically focused services potentially delivering more effective longer term solutions – this, within the context of often challenged financial resources. How do charities look to square this circle and what examples of adaption and innovation can we see across the sector that can highlight ways forward? This lies at the core of what we will look to explore across the day.

During the course of the programme we'll also look at the importance of charity brands in staying visible to your audiences; how understanding impact is key across your organisation – not just the sole preserve of your data orientated colleagues (!) and finally what AI implementation actually resemble in practice.



As has now become a conference tradition, we're delighted to close out the event with our Annual Awards ceremony. This provides a tremendous platform to celebrate the achievements of organisations and individuals across the ACO network and once again we have a really strong roster of shortlisted nominations. We look forward to announcing worthy winners!

Finally, I would like to thank our Conference sponsors - CCLA Investment Management and IE Brand and Digital – and our Awards Sponsor – Family Fund Business Services – for their invaluable support in enabling us to bring this event together.

Enjoy the day!

Donal Watkin, Chief Executive

A WORD FROM OUR SPONSOR: CCLA

CCLA is delighted to partner with the Association of Charitable Organisations for its 2025 annual conference.

As the largest charity fund manager in the UK*, CCLA's ambition is to deliver trusted, responsibly managed, strongly performing products and services aligned to our clients' values and purpose.

We believe investment markets can only be as healthy as the communities and environment that support them. Our purpose is to help all our clients maximise their impact on society by harnessing the power of investment markets. For us and our clients, the value of our work runs deeper than solely financial returns. Good Investment at CCLA means using our voice to engage with companies and government policy makers on issues that matter. We are working with our clients and the investment industry towards a new era of promoting the common good through our distinctive approach to leadership in responsible investment and stewardship - pushing for change on climate, addressing modern day slavery and other human rights injustices, and engaging with companies regarding the mental health of their workforces.

'Responding to Need' is the theme for this year's conference and today we are speaking on 'Good Investment for a Better World' ... but not in the way you might expect.

For more information, please contact Richard Sankey – richard.sankey@ccla.co.uk

*Charity Finance Fund Management Survey 2024, by number of charity clients.

CCLA Investment Management Limited is authorised and regulated by the Financial Conduct Authority.

CCLA
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Good Investment: it's what it adds up to that counts

Find out how CCLA is driving positive
change, visit ccla.co.uk/good

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Image courtesy of Koestler Arts. *Equilibrium*,
Kings Lynn Probation Service, Painting, 2022.

CCLA
GOOD INVESTMENT

A WORD FROM OUR SPONSOR: IE BRAND AND DIGITAL

IE Brand and Digital is delighted to sponsor this year's ACO 2025 Annual Conference. We're looking forward to meeting you all on the day.

As an award-winning agency for charity, health and education clients for over 30 years, IE understands the challenges that charitable organisations and benevolent funds are wrestling with in the current climate. We recognise your work has never been more vital for beneficiaries and we're proud to have worked with ACO members in the past, including Clergy Support Trust, Bank Workers Charity and The Insurance Charity. We're also currently working on an exciting brand and digital project for another ACO benevolent charity that will be announced in the coming weeks. IE also built the ACO's website.

IE's team of experienced brand strategists, researchers, writers, designers, developers and digital architects are based in the historic Jewellery Quarter in Birmingham.

Whether it's supporting charities to tell their stories and recruit donors, helping benevolent funds to reach beneficiaries and overcome barriers, or enabling values-driven organisations to embrace change, IE Brand and Digital helps not-for-profits to make a difference and fulfil their potential through research and testing, internal engagement, brand strategy, messaging, visual identity design, marketing campaigns, behaviour change, content creation, UX and UI design, CMS websites, mobile apps, CRM integrations, and bespoke web applications.

If you'd like to chat, look out for IE's exhibition stand on the day, or send us an email at hello@iebrand.co.uk or hello@iedigital.co.uk to tell us about your challenges.

Thank you.

www.iebrand.co.uk
www.iedigital.co.uk
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The Brand and Digital agency for
Charity, Health & Education.



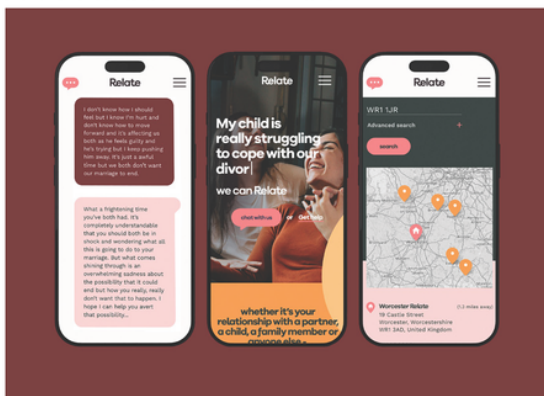
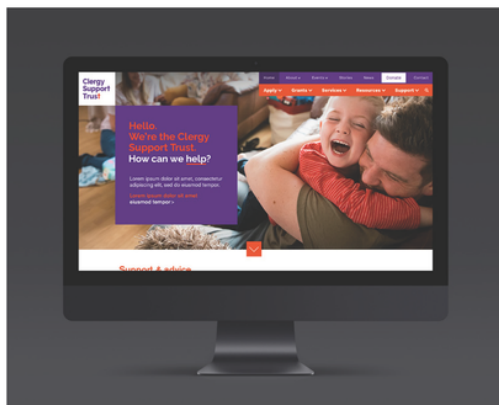
Making a difference for 30 years

The Brand and Digital agency for Charity, Health & Education.

IE helps values-driven clients to engage with their audiences – increasing their impact and reach through research, brand strategy, internal engagement, messaging, visual identity design, campaigns, behaviour change, websites, apps, and innovative digital tools. We've worked with four ACO member benevolent charities to date and we're proud to sponsor the ACO 2025 Annual Conference.



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PROGRAMME

SCAN ME



9.00am

Registration

9.30am

Introduction

- Donal Watkin, Chief Executive, ACO

9.45am

Responding to Need

- Andrew Robinson MBE – Executive Director , CCLA

10.10am

The Future Drivers of Wellbeing and Financial Support

- **Chair:** Jodie Gill, ACO Chair
- Mandi Leonard – Welfare Director, GroceryAid
- Anita McCallum – Director of Impact & Development, The Solicitors Charity
- Ian Johnson – Director of Independence & Wellbeing, Blesma
- Victoria Prouse – Director of Client Services, Bank Workers Charity

11.00am

Break

PROGRAMME

11.20am

Breakout Discussion: Designing Support for Changing Needs

12.10pm

Staying Visible: Adapting Brands to New Charity Landscapes

- David Crichton - Creative Director, IE Brand

12.40pm

Lunch Buffet

1.30pm

What's the Impact of Impact?

- Joanna Micklethwaite – Data & Service Development Manager, Clergy Support Trust

2.15pm

Data Insights – UK Grantmaking 2025

- Katherine Duerden – Head of Support & Services, 360Giving

2.45pm

Break

PROGRAMME

3.05pm

How AI will Practically Change Charity Work

- Sean Sinanan – Impact Lead, Plinth

3.35pm

AI in Action: the Betknowmore Case Study

- Anna Niemczewska – Director of Finance & Operations, Betknowmore

4.05pm

Closing Remarks

- Donal Watkin – Chief Executive ACO

4.10pm

Helping Charities Thrive in Challenging Times

- Jessica Massam – Business Development Manager, Family Fund Business Services

4.25pm

2025 ACO Awards Ceremony

5.00pm

Drinks Reception

6.00pm

Close

OUR SPEAKERS



Andrew Robinson MBE - Executive Director, CCLA
Prior to joining the CCLA, Andrew was Head of Community Development Banking for RBS and NatWest, responsible for the not-for-profit and social enterprise sectors. Before joining NatWest, he was the founding Executive Director of the UK's first community development finance institution to provide loan finance to voluntary and community sector organisations working in the most disadvantaged communities in England.

Andrew is a Fellow of the Royal Society for the Arts and was awarded an MBE for services to social and community enterprise in 2003.

He was appointed as an Executive Director of CCLA in 2006.

OUR SPEAKERS



Jodie Gill – ACO chair and strategic charity leader, consultant & sector advocate

Jodie Gill is a transformational charity leader and strategic consultant with over 20 years' experience driving innovation, operational excellence, and cultural change across the not-for-profit sector. Her leadership is defined by purpose-led strategy, sector-wide collaboration, and a commitment to delivering measurable impact.

As former Chief Operating Officer at caba, Jodie led the organisation through significant transformation building a progressive and future-ready charity focused on insight and outcomes.

In 2025, Jodie founded Charity Tactix, a consultancy supporting charity leaders through strategic decision-making, organisational development, and transformational change. Her work empowers boards and executive teams to navigate complexity with clarity and confidence.

Before embarking on her journey in the third sector, Jodie garnered invaluable commercial experience within blue chip companies and professional service firms. She holds executive education credentials from Oxford Saïd and Bayes Business School and serves as a trustee for the Evnia Charitable Trust.

OUR SPEAKERS



Victoria Prouse - Director of Client Services, Bank Workers Charity

Victoria has 20 years in the charitable sector and spent most of her careers leading advice and grant making service delivery. She is currently Director of Client Services for Bank Workers Charity where she has worked for the last 6 years. Victoria also Chairs the 999 Club, a homelessness charity supporting people in South East London.



Ian Johnson - Director of Independence and Wellbeing, Blesma

Ian is the Director of Independence and Wellbeing for Blesma - The Limbless Veterans, a membership charity that supports military veterans affected by limb loss or loss of use of limb. He is also a trustee for St Albans Old People's Trust, a local charity supporting older people in a defined location.

He joined Blesma in 2024 after 10 years at the RAF Benevolent Fund and prior to that has experience working in a variety of other occupational benevolent funds. His role is to ensure his team can provide effective welfare support, including casework, advocacy and advice, alongside engagement activities to prevent social isolation, for the organisation's membership.

OUR SPEAKERS



Mandi Leonard - Welfare Director, GroceryAid

Mandi has worked in the occupational benevolent fund sector for over 20 years and has been the Welfare Director at GroceryAid since 2017. She is responsible for delivering the Charity's welfare strategy and programmes of financial, emotional and practical support for grocery colleagues in the UK.



Anita McCallum - Director of Impact & Development, The Solicitors' Charity

Anita has worked in the not-for-profit sector (including the NHS) for 20 years and been involved with the issues of wellbeing, homelessness and cancer through the roles held. She has overseen CQC registered services including for substance misuse and rehabilitation from drugs and alcohol as well as run a membership association and trade union for a group of NHS professionals. With broader expertise in strategy, change and external relations, she joined The Solicitors' Charity in 2023. This was her first foray into the occupations support niche and is responsible for marcomms, fundraising, impact and volunteering. She is a Fellow of the Chartered Management Institute and Member of the Chartered Institute of Fundraising.

OUR SPEAKERS



Joanna Micklethwaite - Data and Service Development Manager, Clergy Support Trust

Since joining in January 2022, Jo has transformed Clergy Support Trust into a data-led organisation, with both the Trust's grant-giving and advocacy work powered by the larger quantitative picture of our impact. She is genuinely passionate about translating data into knowledge, and will happily discuss the relative merits of a mean or median average when presenting to a non-specialist audience! Jo was the Project Lead for the Trust's Salesforce implementation which went live in January 2024 and she now manages the iterative improvements to the system alongside her data reporting role. Her contribution to the Trust's valuable advocacy work, has resulted in the Trust gaining a significant grant from the Church of England, to support clergy households with the 'essentials of ministry'.



Jessica Massam – Business Development Manager, Family Fund Business Services

Jessica joined the FFBS Business Development team in 2025, working to onboard prospective clients to help the growth of the business.

Jessica has 13 years' experience in procurement, sales, customer service, business development and people management. Most recently, Jessica worked for a private property developer in the student accommodation industry. Having worked primarily for private sectors, this is Jessica's first experience within a public sector role, and she is keen to utilise her skills for a Social Enterprise.

OUR SPEAKERS



David Crichton – Creative Director, IE Brand

With over 20 years' industry experience under his belt, Dave serves as IE's Creative Director – leading IE's brand offering and award winning design team, as well as working as a Brand Consultant.

Under Dave's direction, IE Brand won two Golds at the Transform Awards Europe 2017, for Best Visual Identity from the Education sector and for Best Brand Architecture Solution. Dave has spent his life and career obsessed with the power of brand, and helping clients to connect with their audiences by standing out from the crowd, and telling their story to the world.

Over the past decade at IE, he's been thoroughly immersed in the worlds of charity, health and education – and before that worked with a number of blue chip clients, including investment banks and building societies, record labels, TV production companies and retail.

OUR SPEAKERS



Sean Sinanan – Impact Lead, Plinth

Sean has extensive experience in TechForGood, exploring how technology can be used for societal benefit. As Impact Lead for Plinth, he focuses on building technical capacity for community organisations and grantmakers. He also has extensive experience in social mobility, youth empowerment and political activism for Muslim and Caribbean communities.



Anna Niemczewska – Director of Finance & Operations, Betknowmore

Anna is Director of Operations and Finance at Betknowmore UK. Joining Betknowmore in 2019, as one of its first recruits, Anna came from a background of co-ordinating a team of technologists where she learned to interpret and arbitrate between the technical/technological capacity and business needs. She's brought this approach to overseeing Betknowmore's HR and organisational culture, IT/Data/Digital, fundraising, legal, and general operations – as Betknowmore incorporated as a charity in 2020, grown to 51 staff and £3 million/year turnover, started working in three countries, and achieved accolades, awards and independent certifications of its efficacy. Anna has been spearheading the development of Betknowmore's AI strategy and practice, working with others across the sector to ensure its effectiveness, value for money - and to avoid the potential pitfalls.

OUR EXHIBITORS

WRS



At WRS Insurance Brokers, their experienced Charity Insurance team are passionate about the sector. For more than four decades, they've supported a wide range of charities and other non-profit organisations with their insurance policies.

No matter how big or small your charity is or what your day-to-day activities involve, it's almost certain WRS has helped an organisation like yours find the insurance they need.

WRS is also proudly part of the Benefact Group, a charity-owned, international family of financial services companies that gives all available profits to charity and good causes.

Francesca Kirkham
Head of Business Development

Sarah Elliott
New Business Executive

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.

Nikki Thompson
Director

Sam Bunney
Account Manager

OUR EXHIBITORS

Charis



Charis has been managing the distribution of financial support, products and services to vulnerable households and community projects for over 20 years.

The Charis Shop saves you time and maximises the use of your funding, letting you focus on what really matters – providing your support.

The one stop e-commerce platform enables hundreds of partners to streamline the delivery of their support to households struggling with financial challenges, ill-health, disabilities or life-affecting circumstances.

From energy vouchers to energy-efficient appliances, soft furnishings to furniture, retail vouchers to digital devices our product range reflects the disparate and changing needs of individuals and families. And CharisPay is now live - you can make real-time cash payments directly into people's bank accounts.

The Charis Shop is simple to use, secure and there are no management fees.

Charis has been managing support schemes, foundations and charitable trusts for not-for-profit organisations and utility companies since 2003. We have been running our own Ofgem regulated Industry Initiatives since 2015.

Each scheme is white-labelled and tailored to reflect the target audience, support avenues, eligibility criteria and available funding, and delivered with a combination of sophisticated software, vulnerability-led human intervention and process efficiency.

Outsourcing scheme management to Charis enables you to focus on your strategic intent, rather than the operational detail. This saves time and costs and helps you optimise the distribution of your support.

Schemes we currently deliver include the Park Homes Warm Home Discount scheme, Let's Talk Energy Fund, GroceryAid School Essentials Grant and more.

businessenquiries@charisgrants.com

01733 421 075

charisgrants.com

Nick Harding
Commercial Director

Jonathan Hall
Chief Commercial Officer

OUR EXHIBITORS

Hope & May



Hope & May is a specialist data protection practice dedicated to the voluntary sector. We understand the unique challenges charities face and tailor our services to meet your needs, whatever your size or focus. Hope & May is the charity sector's most trusted partner in data protection. We work exclusively with charitable organisations, helping them stay compliant, confident, and focused on what matters most.

We're proud to be endorsed by the National Council for Voluntary Organisations (NCVO), Association of Chief Executives of Voluntary Organisations (ACEVO), Directory of Social Change (DSC), and the Association of Charitable Organisations (ACO), to support hundreds of voluntary organisations in managing data lawfully, ethically, and effectively.

Mark Burnett
CEO

Sofiya Mhaisale
COO

Lisa Oliver
PA

OUR EXHIBITORS

Relate

Relate is the leading provider of relationship support in England and Wales with a legacy that spans over 85 years, we've become the go-to resource for couples and individuals navigating the intricacies of their personal connections. Our goal is simple yet profound: to empower individuals, couples, and families to forge and sustain fulfilling relationships. We believe everyone deserves a thriving connection, and we're here to support your beneficiaries to nurture and maintain healthy relationships.

Now, a part of Family Action; the charity for Families, Relate continues to offer a wide range of services tailored to meet the varied needs of partners and their beneficiaries. From couples counselling and individual therapy to family therapy and support for children and young people. Our team of highly trained professionals deliver compassionate and confidential support, ensuring our partner beneficiaries feel safe, heard and understood.

What sets Relate apart as the relationship specialists in England and Wales? It's our unparalleled expertise and commitment to you. We use evidence-based practices, ensuring our methods are effective and reliable. We take pride in our inclusive approach, offering support to people of all backgrounds, genders, and sexual orientations. Our success stories speak for themselves with 80% of clients saying their situation has improved after attending counselling with us.

At Relate, we aren't just practitioners; we're your partners in the journey toward stronger, healthier relationships.

Rebecca Sylvester - National Contracts Manager

Laura McGann - Deputy Director, Business Development

OUR EXHIBITORS

AJM Choice

Shaped by Expertise. Driven by Care.



At AJM Choice, we believe mobility is more than movement - it's about independence, confidence, and unlocking possibilities.

As part of AJM Healthcare, the UK's largest independent provider of NHS-backed mobility services, we bring 40+ years' of experience working alongside the NHS, local authorities, Charities and the Ministry of Defence. With 17 service locations supporting a community of 12.2 million people, we offer trusted care, professionalism, and clinical expertise to those seeking private mobility options. AJM Choice ensures that everyone, regardless of their funding pathway, can access high-quality mobility solutions guided by expert advice.

Our values are much more than just principles, they're woven into the fabric of our business, shaping every interaction, every recommendation, and every solution we provide -

- A clinically-led approach: Our recommendations are informed by medical expertise, ensuring safe, effective and appropriate mobility solutions.
- A commitment to independence: Every solution we provide is designed to empower individuals to live life on their terms. We are manufacturer agnostic, giving us freedom to offer the very best for every individual.
- A customer-centric service: Honest, ethical and tailored advice to help every single customer make the best decisions for their mobility needs.
- Long-term support: We're with you for your whole journey whatever your needs and goals might be. From offering expert guidance to ensuring ongoing support and maintenance, our role doesn't stop at providing mobility solutions - it extends to fostering independence, confidence, and quality of life.

<http://www.ajmchoice.com/>

Daniel Byrne
Account Manager

Jeremy Garman
Director



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
Chief Executive

Kerry Smith
Helpdesk Officer

OUR EXHIBITORS

Plinth



Plinth is an AI-powered platform designed for charities and grantmakers. From AI Grant Management Tools to smart-CRMs, case notes and impact measurement, Plinth brings everything together in one place.

For charities, it's the only software you need to manage your day-to-day operations, helping you store, track, and leverage your data seamlessly. The most important relationship a charity has is with the people they serve and so, have built a variety of AI-powered tools to better understand service users from AI case management to our smart-CRMs for members, volunteers and partners. For charities, our mission is to harness the power of AI for front line impact in a transparent and practical way.

For grantmakers, we've built the first-ever AI Grant Management system. We've been able to automate due diligence, validate applications against the Charity Commission and cut assessment and feedback time by 50%. Foundations are calling it 'transformational.' Automatically generate monitoring reports of your funds and analyse project outcomes at scale.

We're at the forefront of building AI solutions for the sector, to learn more visit www.plinth.org.uk

Sean Sinanan
Impact Lead

ACO ANNUAL AWARDS

Navigating the evolving charity landscape together

In a time of rising demand and financial pressure, the charity sector is evolving. At Family Fund Business Services (FFBS), we partner with grant-giving organisations to streamline the distribution of support, making it easier to serve our communities, focussing on innovation, partnership and collaboration.

Supporting communities

FFBS offer our partners access to thousands of essential items and service in one place. No more juggling suppliers or lengthy procurement exercises, just our simple and centralised ordering platform, providing access to:

- White goods & furniture
- Food & energy vouchers
- Emergency cash payments

With over 12 years' experience partnering with charities to deliver critical support, we understand the challenges you face and the urgency of getting help to those who need it. Orders placed through our platform are fulfilled via our supplier network, with items delivered directly to your beneficiaries. This reduces admin, shortens delivery times and frees up your team to focus on what matters: building resilient communities.

Sponsored by



Family Fund
Business Services



Why FFBS?

Purpose-driven – As a wholly owned subsidiary of Family Fund, every penny of profit goes back to helping families in need.

Built for charities – We understand the sector and are here to collaborate, helping you do more with less.

Get in touch to discover how we can work together to streamline your grants programmes, reduce your admin and ultimately build resilience for your beneficiaries.



“By working with Family Fund Business Services, we can not only support our customers through times of hardship and hopefully equip them with the tools and support to make lasting positive changes, but also know that we’re supporting a charity that is providing essential help to even more families across the country.”

Current FFBS Partner



ACO ANNUAL AWARDS - SHORTLISTED CHARITIES

Sponsored by



Family Fund
Business Services

Small Charity of the Year

- BOSS Business Supply Charity
- Chemical Engineers Benevolent Fund
- Iprovision

Charity of the Year

- Care Workers Charity
- Licensed Trade Charity
- Naval Children's Charity

Campaign of the Year

- Drinks Trust
- Foothold
- Licensed Trade Charity

Charity Collaboration of the Year

- Care Workers Charity with the Rayne Foundation
- Pharmacist Support and Rebel Finance School
- The Solicitors Charity with LawCare

Commercial Collaboration of the Year

- National Benevolent Charity, Lightning Reach, Cash Perks and Crowdfunder
- Pharmacist Support and Outcome Consulting
- ScotsCare and BGPS

Impactful Grant of the Year

- Motor Neurone Disease Association
- Pharmacist Support – Addiction
- Pharmacist Support – Student Bursary

Charity Leader of the Year

- Chris Welham, Chief Executive Officer, Licensed Trade Charity
- Karolina Gerlich, Chief Executive Officer, Care Workers Charity
- Sara Smith, Head of Operations, Naval Children's Charity

Outstanding Achievement Award

- Frankie Stride, Senior Triage Caseworker, Naval Children's Charity
- Terri Jeynes, Support Services Manager, Cavell

