

THE ESG IMPERATIVE



21.02.24 | ONE AMERICA SQUARE, LONDON

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- Starting your journey to net zero
- How to integrate ESG into your investment policy
- Best practice reporting tools and frameworks
- The divestment versus engagement debate
- Building charity boards fit for the future

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THE ESG IMPERATIVE



Tristan Blythe
editor,
Charity Finance

Now is the time to build sustainable organisations that are fit for the future

The challenges facing humanity are immense. As we navigate the ongoing impact of a global pandemic, an escalating climate emergency and an unprecedented cost-of-living crisis, our actions and influence as civil society organisations are more important than ever. There is a growing awareness that organisations of all shapes and sizes have a personal accountability to consider their social and environmental footprint and to behave responsibly. But what does this really look like? How much of the reporting frameworks and strategies being adopted in other sectors are transferable to charities?



Jenni O'Donovan
Events director,
Civil Society Media

From navigating the complex world of responsible investment, through to developing net zero targets and tackling the complexities of reporting and good governance, there is a myriad of practical and ethical decisions facing today's leaders. Our broad range of speakers will offer practical insight and advice, demonstrating the importance and urgency of the ESG agenda, and leaving you better-equipped to take meaningful action.

We hope you will join us for what promises to be an inspiring, practical and thought-leading conference.

Who should attend The ESG Imperative?

**Charity
leaders**

**Finance
teams**

**Chairs and
Trustees**

**Operations
teams**

**Sustainability
leads**

**Investment
directors**

What do past attendees say?

"It was well worth attending and has empowered me to make a start on monitoring and improving our charity's carbon footprint."

Kate Martin, Heathercombe Brake Trust

"I came out of the event full of ideas on how we move our organisation towards an ESG agenda. The task is huge but the overall message I took away was take the first step."

Tracy Elliott, Versus Arthritis

"Excellent information, knowledgeable speakers providing pragmatic approaches and useful insights to the ESG journey in accessible language. Well worth the time attending."

Anonymous

08:45	Registration, refreshments, networking and time to visit exhibition	
09:20	Welcome from Tristan Blythe , editor, <i>Charity Finance</i>	
09:25	Opening keynote – To be announced	
10:00	Transit time	
	Stream A – ESG and Responsible Investment Chair: Stephen Cotterill , editor, <i>Fundraising</i> magazine	Stream B – Starting your ESG journey Chair: Tristan Blythe , editor, <i>Charity Finance</i>
10:05	1A. Cutting the rope in the sustainability versus profitability tug of war Headlines often frame the energy transition and maximising profitability as competing goals. However, we believe that, in the majority of cases, optimising energy transition strategies can also help to maximise long-term returns for companies. We believe our new engagement-led investing approach complements traditional ESG strategies and aims to drive real-world change alongside unlocking significant return potential for investors. This session will cover the latest innovations in this space and how they might fit within charities’ wider responsible investing strategies. Nick Stansbury , head of climate solutions, Legal and General Investment Management	1B. Telling your charity’s ESG story Charities are at different stages of their ESG journey. Whether your charity is just starting out or already making strides, it is important to be able to communicate with key stakeholders how you are navigating this important area. This session aims to provide practical advice in shaping your charity’s narrative across the different facets of the ESG agenda, as well as sharing good practice examples from the charity sector and beyond - including what might be on the horizon. Daniel Chan , director, PwC UK
10:45	Morning coffee and networking	
11:15	2A. Climate Confident: Charity investments and net zero This session will cover the findings from Cazenove Capital’s latest research which highlights a groundswell of concern and action by charities around climate change. 76% of the survey respondents believe that charities should be making commitments to act on climate change, however only 54% have made a commitment to date. Our research has shown that many charities are looking for more guidance on how to incorporate their climate ambitions into their investment strategy. This session will provide practical examples of climate related investment policies and outline the actionable steps in order for you to take the next step. Tom Montagu-Pollock , co-head of charities and Emily Petersen , portfolio director & sustainability lead, Cazenove Capital	2B. Accelerating the pace and scale of responsible business - what does good really look like? One of the challenges facing charities is a lack of guidance, reporting frameworks and benchmarking tools available to help them assess progress. In this session, Business in the Community (BITC) will share an overview of their Responsible Business Tracker tool which enables an assessment of an organisation’s performance and tracks progress against the Responsible Business Map which was built on the United Nation’s Global Goals (also known as SDGs). Join this session to understand more about the urgency surrounding the need for more responsible businesses to help meet the UN’s Global Goals, and practical tips on how to accelerate the pace and scale of your own journey. Speaker tbc , Business in the Community
11:55	Transit time	
12:00	3A. Making ESG more than a buzzword: How to integrate ESG into your investment policy The session focuses on how charities can effectively incorporate ESG (Environmental, Social and Governance) and stewardship expectations and requirements into their investment policy. Attendees will gain insights into the importance of ESG and stewardship in investment decision-making, the benefits of incorporating these factors into investment policies, and how charities can navigate the challenges of implementing these requirements. Tom Holbrook , investment director and Nicola Toyer, head of investments, Investec Wealth & Investment (UK)	3B. Meeting the mandate for climate action: Public expectations and practical responses While the sector waits for official guidance on net zero strategies and ESG reporting requirements, recent research demonstrates that public expectation on charities to be active is rising, including the need for even non-environmental charities to be playing their part. Is there an opportunity for cross-sector collaboration, where charities could share resources and knowledge in order to move forward together faster while also reducing costs? Alex Davies , sustainability and ESG lead, Cancer Research UK
12:40	Transit time	
12:45	Plenary: Embedding an ethical approach into your organisation’s DNA Defining your values and purpose is an essential step to embedding ethical practice in any organisation. However, navigating the complexities around your moral obligation as a charity towards your beneficiaries, staff and other key stakeholders are far from simple. Sir Laurie Magnus’ experience spans a four-decade career in finance in the City of London, chair of Historic England, deputy chair of the National Trust and most recently, as chair of The City of London Investment Trust and a senior advisor at the investment banking firm Evercore Partners. We invite him to share his take on how to go about making financial and strategic decisions that are in the best interest of your charity in the long-term. Sir Laurie Magnus , deputy chairman, European investment banking, Evercore Partners	
13:15	Lunch and time to visit exhibition	
14:15	4A. ESG masterclass: using ESG to drive value This session will use real life company case studies to demonstrate how ESG can be integrated into financial modelling, with the goal of driving stronger investment returns for charity investors. Olivia Lewis , charity investment advisor, & Mike Topley , head of sustainable portfolio management, Barclays Private Bank	4B. Panel: Building charity boards fit for the future The composition and strategic focus of any organisation’s board is crucial to determining the direction of travel. Without buy-in at the top, and the right balance of voices round the table, it will be extremely difficult to progress ESG initiatives or champion meaningful change. We invite our speakers to consider some of the challenges posed by traditional governance models, and where untapped opportunity might lie in order to remove any existing barriers and create sustainable charities fit for the future. Chair – Meg Wright , voluntary sector consultant and governance specialist Panellists – Bushra Ahmed , trustee, Lloyd’s Bank Foundation, Ri Chakraborty and Leon Ward , chief executive, MyBnk
14:55	Transit time	
15:00	5A. Fuelling positive change – using the collective power of charity investments to tackle the climate crisis In this session, we delve into the heart of NCVO’s ‘Fuelling Positive Change’ campaign, a transformative initiative urging charities to reconsider their investment in fossil fuels. With fossil fuels accounting for a significant portion of global greenhouse gas emissions, this campaign stands as a rallying call against the unsustainable practices that contribute to climate change and social inequalities. Our speakers share their own experiences of campaigning for and embracing divestment: from understanding the importance of supporting a fossil-free economy, through to the practicalities and process involved with divesting, and advice for gaining board buy-in. Chair – Muireann Montague , senior campaigns officer, NCVO Panellists – Tessa Khan , founder and executive director, Uplift and Paul Parker , recording clerk, Quakers in Britain	5B. The journey to net zero – starting from scratch Every journey begins with taking a single step and no matter how small, any positive action is better than inaction. This session will share some insights and inspiration from ‘Going Green Together’, an initiative supporting organisations and communities in the North East and Cumbria to take action on the climate emergency, support nature and biodiversity and ensure a just transition to a low carbon future for our communities. Carol Botten , chief executive, VONNE (Voluntary Organisations’ Network North East)
15:40	Afternoon coffee and networking	
16:00	From the director’s chair – leading and developing responsible organisations in turbulent times In an era of permacrises, running any organisation comes with many pressures. Charity leaders in particular are under more scrutiny than ever to deliver their mission and to meet the needs of both internal and external stakeholders. In addition, economic insecurity and an escalating climate crisis continues to impact the fabric of society and our planet. What role do charities have to play in all of this and should organisations consider changing their strategy to ensure sustainability in the long term? We ask our panel what being a responsible organisation looks like to them, and what kind of leadership is needed to navigate the challenges currently facing our sector. Chair – Ian Allsop , contributing editor, Charity Finance magazine Confirmed panellists include – Enver Solomon , chief executive, Refugee Council	
17:00	Chair’s closing remarks	
17:05	Networking drinks reception	

QUICK REGISTRATION

	Early-bird tickets (before 26 January)	Final release tickets (after 26 January)
Charity Finance subscriber rate	£79 (exc VAT)	£149 (exc VAT)
Charity delegate	£99 (exc VAT)	£169 (exc VAT)
Charity team ticket (up to four places) **Limited quantity available**	£249 (exc VAT)	£460 (exc VAT)

Delegate name (inc title)	Position	Email	Your sessions (write letter A-B) in box provided									
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