

Organised by



# TRUSTEE EXCHANGE

CONFRONTING REALITIES AND EMBRACING CHANGE

**28.04.2026**

BMA House, London

- Governing well in difficult times • Financial red flags
- Trans rights: legal update for charities • The co-chairing revolution
- Charity Commission chair priorities • Diversifying funding
- Charities and AI • Ethics and reputation management
- Aligning investments with organisational mission
- The art of constructive challenge • Legal and regulatory updates

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# WELCOME



Welcome to Trustee Exchange 2026, our 18th annual edition of this friendly and practical conference for charity trustees and senior leaders.

The theme this year is 'Confronting realities and embracing change'. Nobody reading this needs me to tell them how tough it is out there right now: at a macro level we are facing escalating global tensions, unprecedented threats from climate change and AI, and acute political discord; while day to day, charities are grappling with rising costs, volatile funding, and unrelenting demand for their services. Over the last couple of years, sector news outlets have been awash with stories of charities shrinking, merging or going to the wall, and the challenges driving these changes don't seem likely to abate any time soon.

So at this year's Trustee Exchange, we will lean into this reality, and help you, as trustees and senior executives, to govern and lead proactively in this time of overwhelming unpredictability. Most of the sessions will give you tools and ideas for giving your charity its best chance at sustainability – with topics from diversifying fundraising and maximising investment income, to using AI and protecting your reputation through innovative ethics training. But we also want to acknowledge the scale of the challenges and complexities facing civil society, and explore what responsible leadership looks like in this era of profound uncertainty, with its potential for organisational contractions, transitions, and even endings.

As always, we'll also have an essential update from the Charity Commission, and two not-to-be-missed keynote speeches: one from Sanctuary Foundation founder Dr Krishna Kandiah, and the second from Debra Allcock Tyler, Directory of Social Change CEO, on the art of effective challenge in the boardroom. If you know Debra, it'll be worth coming for that one alone!

Trustee Exchange usually sells out, so get your (team) tickets early. We look forward to seeing you there.

*Tania Mason*

**Tania Mason**, editor, Governance & Leadership



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## Organised by Governance & Leadership magazine

Governance & Leadership is a bi-monthly publication helping charity leaders and trustees on their journey from good practice to best practice. Subscribe today at [civilsociety.co.uk/shop](http://civilsociety.co.uk/shop)

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09:00	Registration, coffee & networking		
09:20	Chair's welcome – <b>Penny Wilson</b> , charity sector consultant and trustee, London Plus		
09:30	<b>Opening keynote: Leading with compassion: Making a difference, not just noise</b> In this opening keynote, Dr Krish Kandiah OBE invites us to imagine a more hopeful path to genuine change – one where moral ambition is matched with creative courage, strategic collaboration and deep compassion. Drawing on his experience as a foster parent, charity leader, government adviser, leadership consultant and academic, he reflects on how even the smallest organisations can move mountains for the common good and why the future of civil society depends on learning to hold together protest and productivity, conviction and care. <b>Dr Krish Kandiah</b> , co-founder, the Sanctuary Foundation		
09:55	<b>Plenary panel discussion – Reality check: Facing into the headwinds of change</b> Times are tough. Many charities are struggling to navigate the perfect storm of rising costs, stiff competition for funding, and growing demand for their services – not to mention the additional challenges wrought by the divisive political climate and heightened global tensions. In the last couple of years, news outlets have been awash with stories of charities shrinking, merging or closing entirely, and the pressures driving these changes don't seem likely to abate any time soon. In this timely and important discussion, our expert panel will explore what responsible leadership looks like in this era of profound uncertainty, with its potential for organisational contractions, transitions, and even endings. <b>Rebecca Graham</b> , former deputy CEO, Revitalise Respite Holidays; <b>Rohan Hewavisenti</b> , chief financial officer, Amnesty International; <b>Iona Lawrence</b> , co-founder, The Decelerator (panel chair); <b>Douglas Westwater</b> , CEO, Community Enterprise; <b>Neil Tester</b> , chair, Healthwatch Hertfordshire		
10:55	<b>Morning networking break</b>		
	Stream A – Finance & Investment Chair: <b>Tristan Blythe</b> , editor, Charity Finance	Stream B – Governance & Strategy Chair: <b>Jenni O'Donovan</b> , events director, Civil Society Media	Stream C – Compliance & Culture Chair: <b>Penny Wilson</b> , charity sector consultant and trustee, London Plus
11:25	<b>1A. Red flags and distress signals – and being open to all possible options</b> In the current climate, the board's role in exercising prudent financial supervision is more crucial than ever. But how can you tell if your charity is still in good financial health? What are the key indicators of strength and resilience, and what red flags in the management accounts might indicate that the organisation is in distress? In this session, accountants Steve and Richard will outline what constitutes effective board oversight of the accounts, highlight the early warning signs that could signal a charity is in trouble, and offer expert advice on how to weigh up potential future pathways – while ensuring beneficiaries remain at the heart of all decisions. <b>Richard Weaver</b> and <b>Steve Harper</b> , partners, HaysMac	<b>1B. Governing well in difficult times</b> Trustees today are expected to volunteer to govern in especially challenging times. So how can boards lead well in a demanding political, cultural, financial and fast-changing digital environment? And, more specifically, what can boards get right when things go (very) wrong? Join The Centre for Charity Effectiveness (CCE) to reflect on lessons from wide-ranging practice of working with charity boards and think about how your board might overcome even the most challenging of contexts and events. <b>Nick Wilkie</b> , visiting lecturer and <b>Steph Harland</b> , consultant, The Centre for Charity Effectiveness, Bayes Business School	<b>1C. Session details to be confirmed</b>
12:10	<b>Transit time</b>		
12:15	<b>2A. Investment policy best practice</b> Over the past decade, the investment landscape has evolved significantly. The range of available investments has broadened, and there have been notable developments in both sustainable and values-aligned investing. In addition, the Charity Commission has updated its guidance (CC14), and the Charity Investment Governance Principles were published in early 2025. In response to these changes, Cazenove Charities will be publishing updated, peer-reviewed best practice guidance for investment policies. A robust Investment Policy Statement safeguards a charity's financial future, aligns investments with its mission, and strengthens confidence among all stakeholders. It is not simply a regulatory requirement, but a strategic asset. <b>Tom Montagu-Pollock</b> , co-head of charities, and <b>Tom Holbrook</b> , portfolio manager, Cazenove Capital	<b>2B. Two heads are better than one – The co-chairing revolution</b> More and more charities are choosing to appoint two chairs rather than one. But how does this work in practice? How are responsibilities divvied up; how are meetings chaired; how are lines of communication with trustees and the executive team set out; what happens if the co-chairs disagree – or, worse, fall out? Join this session to hear how one charity handles the arrangement and what all the parties really think of it. <b>Dalton Leong</b> and <b>Lena Bheero</b> , co-chairs, Board Racial Diversity UK	<b>2C. Developments in Charity Commission regulation and other legal updates</b> Bring yourself up to speed with recent developments in law and regulation affecting charities by joining Hannah and Harriet for a whistlestop tour of latest Charity Commission pronouncements and inquiries, updates to statute and guidance, and pertinent employment tribunal cases. And to ensure you pay full attention, they promise to intersperse these with their unique lawyerly view of relevant topical news headlines, plus amusing anecdotes of real-life charity governance traps and horror stories. <b>Hannah Kubie</b> , partner, charity law and governance team, and <b>Harriet Broughton</b> , partner, employment team, Stone King
13:00	<b>Lunch break</b>		

14:00	<b>Charity Commission : The next chapter</b> In one of her first official speeches as the new chair of the regulator, Julia will set out her thoughts on issues, challenges and opportunities facing the sector, and her priorities in the role. <b>Dame Julia Unwin</b> , chair, Charity Commission		
14:20	<b>Transit time</b>		
14:25	<b>3A. Session details to be confirmed</b>	<b>3B. Diversifying funding – Tips, tools, and the vital role of the board</b> In today's competitive fundraising climate, a diversity of income streams is crucial to give your charity its best chance at sustainability. In this session, our panel will introduce some fundraising tools and techniques that your charity might not have considered, as well as outlining how the board can encourage and nurture innovation in fundraising in order to achieve success. <b>Carly Fields</b> , chair, DEBRA (panel chair); <b>Anaish Yilma-Parmar</b> , chair, Remember a Charity and head of legacies, British Red Cross; <b>Jamila Daley-Jeffers</b> , consultant, Get That Money; <b>Joasia Lesniak</b> , head of fundraising at St Luke's - Sheffield's Hospice	<b>3C. Charities and AI – Latest developments at individual charities and across the wider sector</b> Two years on since the last packed-out Trustee Exchange session on charities and AI, we have assembled a fresh panel of AI experts to help us navigate the challenges and opportunities inherent in this formidable technology. In this session you will discover how two charities are using AI in their operations, hear what the sector-wide AI Task Force is doing to get charities' concerns heard by government, and learn what questions trustees should be asking to ensure that their charity can access the benefits of AI while keeping safe from its worst tendencies. <b>Zoe Amar</b> , co-chair, the Charity AI Task Force; <b>Tania Mason</b> (panel chair), editor, Governance & Leadership; <b>Ian McLintock</b> , founder, Charity Excellence; <b>Emma Gervasio</b> , chief operating officer, Royal Voluntary Service; <b>Dan Brown</b> , digital marketing manager, the Myton Hospices
15:10	<b>Refreshments &amp; networking break</b>		
15:35	<b>4A. Aligning investments with organisational mission – A case study from UnLtd</b> As trustee for the £185m endowment of the Millennium Awards Trust, last year UnLtd revised its investment policy to make a commitment to sustainable investing and to introduce impact investing into the portfolio over time. The new strategy weaves together seeking to achieve good financial returns with increasing positive impact for society across a spectrum of social and environmental issues. The organisation wants to learn and be wholly transparent about its approach and what happens as a result. Join this session to gain insights into UnLtd's changes to its investment policy, strategy, asset allocation and fund management – and how it's all going. <b>Jamie Broderick</b> , chair, investment committee, and <b>Mark Norbury</b> , CEO, UnLtd	<b>4B. Session details to be confirmed</b>	<b>4C. Ethics and reputation management – What would Connie do?</b> How many charities have ethics policies that sit on a shelf gathering dust, discarded and ignored by their intended audience? Wellcome was determined to find a way to make ethics training engaging, memorable and fun for its workforce, and the result was Connie, an award-winning pink puppet that embodies ethical behaviours and empowers employees to make sound decisions. Join this session to learn about the inspiration for Connie's creation, how this inclusive character has redefined Wellcome's compliance training, and why creativity and innovation trumps rigid rules and box-ticking every time. <b>Fraser Simpson</b> , ethics lead, Wellcome
16:20	<b>Transit time</b>		
16:25	<b>Closing keynote: The art of constructive challenge</b> In an age where society appears hopelessly polarised, our political leaders seem intent on stoking division, and social media algorithms only reinforce our own (obviously correct) worldview, how are we to maintain a sense of respect and civility in our charity boardrooms? If the role of trustees is to challenge and scrutinise, and definitely to avoid groupthink, how can we practise healthy debate without it crossing into toxic squabble or, worse, disintegrating into open warfare? Thankfully, we have sector oracle Debra Allcock Tyler to help us strike the right balance. Debra grew up in a family that relished a lively dinner time discourse, and learned from a young age the vital skill of disagreeing agreeably. And after a long career supporting charity boards, she even wrote a book about it. So do join us for this essential closing address which promises to be entertaining, engaging and important in equal measure. <b>Debra Allcock Tyler</b> , chief executive, Directory of Social Change; trustee, In Kind Direct; author of It's a Battle on the Board and Board Papers		
16:50	<b>Chair's closing remarks</b>		
16:55	<b>Networking drinks reception</b>		

# The must-attend event for charity CEOs, chairs and trustees



## What did the 2025 delegates say?

“ It was my first time at Trustee Exchange and I was very impressed by the overall quality and relevance of the content, speakers, delegates, sponsors and other attendees. ”

**Stephen Aulsebrook**, Global Legal Action Network

“ Very well organised event giving lots of ideas to take back to our own organisations to help strengthen trustees' effectiveness. ”

**Maggie Kelly**, Community & Voluntary Support Conwy

“ Really good – well spaced throughout the day and just the right length. I had some great conversations. ”

**Sarah Sandbrook**, LionHeart

“ Where else would you get such a wide variety of charity trustees to network with! ”

**Michelle Richmond**, APM

“ Well worth attending – I do get much more out of in-person events, I feel I am more present and the networking social side is really important. ”

**Kit Sturgess**, Cats Protection

“ The premier conference for charity trustees, as reflected in the attendance, the quality of the speakers and the smooth organisation. ”

**John Williams**, Stanhope Primary

# WELCOME

## PRICES

	Early bird (before 13 March)	Final release tickets (after 13 March)
<b>Small charity rate (&lt;1m income)</b>	£199	£199
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<b>Charity delegate</b>	£269	£319
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