# CharityFinance Summit

## Seeing the big picture: Finance, impact and the story you tell

**16.10.2025**

133 Houndsditch, London

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# Charity Finance Summit 2025



**Tristan Blythe**, editor, *Charity Finance*



**Jenni O'Donovan**, events director, Civil Society Media

Charity finance is at an inflection point. With increasing economic uncertainty, a shifting regulatory landscape, and growing expectations from stakeholders, charity finance professionals are navigating more complexity than ever before. This year, in response to sector insight and delegate feedback, we've reimagined the Charity Finance Summit to meet the moment. Now in its eighteenth year, the Summit moves to a new venue to accommodate an expanded programme, spread across five tailored content streams. From the latest technical developments, including the new SORP, to the wider strategic challenges facing the sector, this year's agenda is designed to equip charity leaders with the clarity and confidence to lead through change.

Our theme **Seeing the big picture: Finance, impact and the story you tell**, reflects a growing imperative: to ensure that financial strategy not only underpins mission, but strengthens how charities tell their story, build trust, and drive impact.

Join us on **16 October** to connect with peers, learn from experts, and explore how your organisation can not just survive – but thrive.

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## PROGRAMME AT A GLANCE

| | |
|---|---|
| 08:45 | Registration |
| 09:20 | Conference welcome |
| 09:25 | Opening keynote |
| 10:15 | Morning sessions |
| 10:55 | Networking and refreshment break |
| 11:25 | Morning sessions |
| 12:50 | Lunch break |
| 13:55 | Afternoon sessions |
| 15:20 | Networking and refreshment break |
| 15:45 | Afternoon sessions |
| 16:30 | Final reflections |
| 17:00 | Networking reception |

CharityFinance WEEK
13-17 OCTOBER 2025

On 13-17 October 2025 we will be celebrating excellence in charity finance practice through a dedicated week of content and thought-leadership initiatives, with the Charity Finance Summit forming the centrepiece of the week.

To find out more about what's happening during the week, visit:

**civilsociety.co.uk/CFWeek2025**

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> "Very informative and interesting day. Loved how the conference promoted sustainability through plant-based food and lots of sustainability-focused sessions."
>
> Emma Nowak, Mencap


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# Opening keynote speaker:



**Professor Anand Menon**

Anand Menon is a leading expert on the UK's relationship with Europe, as well as domestic and foreign affairs more broadly. As Professor of European Politics and Foreign Affairs at King's College London, and Director of the think tank UK in a Changing Europe, he has spent over three decades researching and teaching British and European politics at leading universities.

He is co-author of Brexit and British Politics, a detailed analysis of the forces behind the Brexit vote, the evolving relationship between the public and politics, and the broader implications for democracy in the UK.

**Britain in flux: Geopolitics, markets and the future of UK-EU relations**

As the UK faces a defining moment shaped by post-Brexit realities, global economic pressures, and political instability, understanding the broader context has never been more vital. In his opening keynote, Professor Anand Menon will examine how international economic headwinds and domestic political turbulence are reshaping the environment in which charities operate. He will outline what these macro-level developments could mean for public trust, policy direction, and the economy, and equip you with the political foresight needed to plan – and lead – through uncertainty.

# With charity speakers from:

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Teamwork Trust
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# CharityFinance

## Subscribers to Charity Finance can save £20 on tickets

Published 10 times a year, Charity Finance is packed with practical articles and analysis of the latest financial trends, as well as in-depth briefings on technical and legal changes, and benchmarking surveys to help busy finance teams get value for money. With a 25-year history, Charity Finance is the leading finance publication for the sector.

**Each issue includes:**

- Features and analysis on the latest talking points in sector practice and government policy
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- Case studies showcasing best practice and innovative projects
- Latest data on the sector's income streams and investment portfolios

**Plus regular surveys such as:**

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- Charity Fund Management Survey – an in-depth insight into the investment firms serving the sector, as well as the latest trends
- Charity Banking Survey – which banks are the most popular in the sector and how do charities rate their services?
- Charity Shop Survey – the definitive analysis of how the UK's charity shop chains are performing
- Charity Pooled Funds Survey – this survey canvasses fund managers' views on the risk and return characteristics of pooled funds

**Find out more at civilsociety.co.uk/cfmag**




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# MORNING SESSIONS

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|---|---|
| 08:45 | Registration, refreshments, networking and time to visit exhibition |
| 09:20 | Welcome from **Tristan Blythe**, editor, *Charity Finance* |
| 09:25 | **Opening keynote – Britain in flux: Geopolitics, markets and the future of UK-EU relations**<br><br>The UK faces a defining moment shaped by post-Brexit realities, global economic pressures, and political instability. An understanding of the broader context has never been more vital. In this opening keynote, Professor Anand Menon, a leading voice on UK-European relations, will examine how global economic headwinds and domestic political turbulence are reshaping the environment in which charities operate. He will outline what these macro-level developments could mean for public trust, policy direction, and the economy, and equip you with the political foresight needed to plan – and lead – through uncertainty.<br><br>**Professor Anand Menon**, Professor of European Politics and Foreign Affairs, King's College |
| 10:05 | Transit time |

| | Stream A – Tax & Accounting | Stream B – Governance & Leadership | Stream C – Risk & Strategy | | Stream D – Investment | Stream E – Innovative finance and storytelling |
|---|---|---|---|---|---|---|
| 10:10 | Chair's welcome: **Richard Bray**, Cancer Research UK | Chair's welcome: **Penny Wilson**, governance consultant | Chair's welcome: **Ian Allsop,** *Charity Finance* | | Chair's welcome: **Diane Sim**, *Charity Finance* | Chair's welcome: **Tristan Blythe**, *Charity Finance* |
| 10:15 | **1A. The SORP shake up: what the latest update means for your charity**<br><br>Changes to the Charities SORP and FRS 102 are on the horizon, bringing key changes that will shape how charities report and communicate their impact. This session will unpack the most important updates, including changes to revenue recognition, lease accounting and the trustees' report, and offer practical guidance on how to prepare.<br><br>**Steve Harper**, partner and head of social purpose, HaysMac | **4B. Aligning your money with your mission**<br><br>A charity's mission is at the heart of everything you do, but is your financial strategy working in harmony with that mission? This session will explore why having the right banking and financial support is not just a nice-to-have, but an essential part of delivering on your charitable purpose. From how you raise and spend money, to how you manage risk and choose your financial partners, we will examine the core financial principles that will help charities deliver on their mission.<br><br>**Alison Taylor**, chief executive, CAF Bank and CAF Financial Solutions Limited | **1C. ESG and carbon accounting: what charities need to know**<br><br>From charities looking to measure their environmental and social impact, to those that may need to increase their level of reporting in light of the proposed revised SORP regulations, ESG is a sector-wide conversation. Join Xledger's experts as they discuss real-world case studies, including how charities can automate ESG reporting and deliver valuable insight across their organisation.<br><br>**Deborah Moreton**, senior consultant, Xledger and **Pip Ross**, director of finance & IT, We The Curious | | **1D. Strategic investment for enduring impact: rethinking long-term portfolios**<br><br>Institutional charities face the unique challenge of balancing current income needs with the preservation and growth of capital for future generations. In this session, we explore how endowments and long-term portfolios can be structured to deliver both financial resilience and mission-aligned impact. Drawing on real-world examples, we'll examine how trustees can navigate economic uncertainty, integrate ESG principles meaningfully, and ensure investment policies remain fit for purpose. Ideal for those overseeing significant assets or planning strategic investment reviews, this session offers a practical roadmap for building portfolios that serve both todays and tomorrow's beneficiaries.<br><br>**James Ayre**, head of investments, charities, Rathbones | **1E. Harnessing AI and financial insight to navigate a changing landscape**<br><br>In a world where geopolitical shifts and economic instability are redefining the landscape, not-for-profit organisations face mounting challenges in securing funding and maintaining operational transparency. This session will explore how Sage Intacct's AI-powered financial solutions can help charities adapt, thrive, and make data-driven decisions. Join us as we demonstrate how AI can unlock efficiency and insights in financial operations, enabling organisations to navigate uncertainty and achieve long-term sustainability in a rapidly changing environment.<br><br>**Hobby Dean**, senior solution consultant, Sage |
| 10:55 | Networking and refreshment break | | | | | |
| 11:25 | **2A. Legacy management matters: building confidence through clarity**<br><br>Legacy income is a vital and growing funding stream, currently worth £4bn to the sector and expected to rise to £10bn by 2050. Yet, the absence of clear guidance on how to recognise and report this income in charity accounts has led to inconsistent practices, making it difficult for stakeholders to interpret financial information confidently. This session will explore how a consistent, sector-wide approach to legacy management could strengthen relationships with executors, enhance transparency, and improve the reliability of legacy income reporting. Following the FRC's revised guidance and the proposed SORP's refined clarity around the broader concepts, join this session to discuss the opportunity to drive change, collectively raise standards and future-proof legacy income and strategic management.<br><br>**Dave Hawes**, director, Institute of Legacy Management and director of corporate services, Devon Air Ambulance Trust | **2B. Communicating impact, avoiding controversy – developments in Charity Commission regulation and the law**<br><br>Recent developments including the May 2025 High Court judgment in the Kids Company judicial review, a Charity Commission official warning on 'divisive and inflammatory' social media activity, and regulatory inquiries concerning high profile investment failures and other financial and governance concerns have highlighted the importance of communicate a charity's activities with care – and the risk that apparently routine transactions will come under scrutiny.<br><br>Join this session to hear Laura and Kara reflect on these and other recent developments in charity law and regulation and how finance professionals and trustees should respond to them.<br><br>**Laura Chesham**, partner and **Kara Stephen**, associate, VWV | **2C. What happens if your bank goes bust?**<br><br>This session will discuss the risks for charities in the UK banking market, and provide strategies to mitigate potential threats. It will explore how geopolitical instability can impact the UK banking sector and how the sector remains resilient by leveraging protective measures like ring-fencing and FSCS. Additionally, attendees will learn about the advantages of modern cash management platforms and how they can help reduce the risks associated with charities' cash-at-bank.<br><br>**Giles Hutson**, executive chairman, Insignis | | **2D. The Charity Investment Governance Principles**<br><br>The Charity Investment Governance Principles (CIGP) were published earlier this year and explore best practice in charity investment decision-making, reflecting the Charity Commission's CC14 guidance and the Charity Governance Code. The CIGP are relevant for all investment committee members, trustees and executives involved in investing charitable assets. In this session, attendees will hear about them directly from their lead author, Gail Cunningham and will have the opportunity to discuss how they could be applied in practice.<br><br>**Kate Rogers**, global head of endowments & foundations, Cazenove Capital | **2E. The Women's Rights Fund and Oxfam's strategic shift**<br><br>In the wake of deep cuts to international development aid and an increasingly unstable funding landscape, Oxfam is rethinking its financial strategy through the creation of the Women's Rights Fund (WRF) – a bold new model that provides flexible, multi-year support directly to grassroots women's rights organisations. This session will explore how the WRF is not only amplifying the impact of partners on the ground, but also transforming Oxfam's own funding approach and organisational strategy. By shifting away from restrictive, project-based aid towards more equitable, trust-based finance, Oxfam is building a more resilient, agile model – one with the potential to catalyse wider change across the sector.<br><br>**Halima Begum**, chief executive, **Raghda Daboub**, gender justice programme manager, Occupied Palestinian Territory, and **Tarek Alyazji**, international finance manager, Occupied Palestinian Territory, Oxfam |
| 12:05 | Transit time | | | | | |

> "A positive atmosphere at a very well organised and attended event. There were some great and interesting speakers and I enjoyed the day."
>
> Jeremy Radley


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# AFTERNOON SESSIONS

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|---|---|---|---|---|---|---|
| 12:10 | **3A. Employment tax: governance and reporting**<br><br>This session will focus on the introduction of the mandatory payrolling of benefits in kind, labour supply chain due diligence, holiday pay, and pay transparency issues.<br><br>**Mark Seaden**, employment tax director and **Simon Thurston**, associate directors, BDO | **3B. Strategic ESG: the power of materiality to prioritise your resources – lessons from Wellcome**<br><br>Organisations striving for meaningful sustainability impact often face a fundamental question: where should we focus our efforts? This session delves into how a materiality study can serve as a critical foundation for defining sustainability benefits and aligning ESG strategy with organisational purpose. Drawing on the Wellcome's approach, we'll explore how identifying what truly matters to stakeholders and operations helps clarify priorities, focus resources where it matters, surface long-term risks and opportunities, and guide impactful decision-making. Whether you're refining your ESG roadmap or just beginning the journey, this session offers a grounded, actionable perspective on moving from ambition to action.<br><br>**Charles Joly**, associate director, sustainability, Wellcome | **3C. Better decisions, greater impact: the financial intelligence ambitious charities need now**<br><br>Funding is tougher than ever. Donors want proof of impact. Regulators expect tighter reporting. And charities are being asked to do more with less – again.<br><br>In this session, Andrew Faulkner will cut through the noise to show how smarter financial management can drive real results. From tracking restricted funds to making confident budget calls, we'll explore how better data leads to better decisions – and bigger impact. You'll leave with practical insights to help you close the year strong, build financial resilience, and plan with clarity for 2025.<br><br>**Andrew Faulkner**, senior charity manager, AccountsIQ | | **3D. Can Vietnamese rats offer insights into charity investing?**<br><br>What does the current policy-driven environment mean for charity investors? Join our Head of Macro Strategy, Chris Jeffery, who will take look back at an unlikely event in 19th century Vietnam to provide parallels for today's investment decision-maker. In particular, Chris will discuss three areas where the risk of unintended consequences should be of paramount concern to charity trustees:<br><br>• Reckless prudence: the unintended consequence of not taking enough risk<br>• Path dependence: the unintended consequence of taking too much risk<br>• Illusion of knowledge: the unintended consequence of opinion overload<br><br>**Christopher Jeffrey**, asset allocation strategist, L&G | **3E. Maximising philanthropic income through donor advised funds (DAFs)**<br><br>In today's complex and unpredictable funding climate, charities must explore innovative approaches to secure sustainable income. This session will explore the growing influence of donor advised funds (DAFs) as a tax-efficient and admin free structure for giving. The discussion will cover how DAFs work, their implications for donor engagement, and practical steps to position your organisation to access and maximise this evolving source of funding.<br><br>**Annika Greco Thompson**, growth and relationship manager and **Rachel Steeden**, head of legal, Stewardship |
| 12:50 | Lunch, networking and time to visit exhibition | | | | | |
| 13:55 | **4A. VAT and tax opportunities**<br><br>As charities look to create opportunities, be it new income and funding streams or making cost savings, this session will explore how VAT and direct tax can be used to help organisations in these initiatives, as well as advising on managing their risks effectively.<br><br>**Chris Evans**, charities VAT director and **Helen Berry**, director, BDO | **4B. Access denied? Banking barriers and solutions**<br><br>Charities face growing challenges in accessing basic banking services, with account closures and delayed transactions increasingly disrupting operations – particularly for organisations working in high-risk regions. Drawing on the latest research from the Muslim Charities Forum, this session will explore the root causes, regulatory context, and practical solutions for charity finance professionals, including improved compliance strategies, sector-wide advocacy, and ways to build more constructive relationships with banks.<br><br>**Abdulsami Arjumand**, policy and advocacy lead, Muslim Charities Forum | **4C. A marginal gains approach to achieving long-term sustainability**<br><br>In this session, Karen Watson will reflect on Macmillan's recent transformation and its ongoing journey towards long-term sustainability. She will talk about the importance of seeing the bigger picture, exploring the opportunity for charities to diversify their income streams and the importance of thinking differently about strategic planning and impact measurement. Karen will also share insights on engaging colleagues and stakeholders throughout the process, and how empowerment is essential to building an impactful and resilient future.<br><br>**Karen Watson**, chief finance and operations officer, Macmillan Cancer Support | | **4D. The impact of geopolitics on financial markets**<br><br>Geopolitics have been dominating the investment landscape recently as both macroeconomics and company fundamentals take a back seat. What does this mean for charity investors and how can we structure long-term portfolios to minimise the risks and maximise the returns in the face of the inherently unpredictable?<br><br>**Joseph Greif**, director, investment specialist, Evelyn Partners | **4E. How Greggs Foundation leveraged Microsoft Business Central to drive efficiencies and maximise impact**<br><br>Discover how Microsoft Dynamics 365 Business Central and the Microsoft technology stack is revolutionising financial management for charities. In this session, hear directly from Greggs Foundation about their journey implementing Business Central, a natural extension of their existing CRM implementation for the Greggs Breakfast Club initiative, together with the transformative benefits they've achieved. We'll share practical insights into streamlining operations, improving financial oversight, and enabling more impactful decision-making. Don't miss this opportunity to learn how technology can empower your charity to deliver greater efficiency and focus more on its mission.<br><br>**Daniel Booth**, lead pre-sales consultant, mhance and **Sally Cooper**, systems & operations manager, Greggs Foundation |

*Continued overleaf*

> "This is the one event of the year that I would hate to miss out on! A thoroughly enjoyable day which provides an opportunity to challenge your current thinking and approach as well as providing an opportunity to meet up with fellow professionals, who are all experiencing similar issues as yourself."
>
> Kevin Gunton, Julian Support Limited

> "A really worthwhile event to connect with people working in the same space, understand the challenges faced by the sector, gain some technical insights and sometimes just confirmation that you've got things covered!"
>
> Caroline Williams, Lhasa Limited



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# AFTERNOON SESSIONS

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|---|---|---|---|---|---|---|
| 14:35 | Transit time | | | | | |
| 14:40 | **5A. Navigating the evolving landscape of employment tax**<br><br>Charities are facing growing complexity when it comes to employment tax - from the payrolling of benefits in kind to employment status and other key changes on the horizon. What are the latest developments, and how can organisations stay compliant while managing risk? This session will explore the current challenges and offer practical insights to help charities negotiate this ever-changing terrain with confidence.<br><br>**Nick Bustin**, director, head of employment tax, HaysMac | **5B. Creating space to care: valuing volunteering and wellbeing in challenging times**<br><br>With national insurance increases and rising operational costs, many organisations are being asked to deliver the same, or more, with less. In this session, Teamwork Trust, a small but impactful charity supporting adults with learning disabilities, autism, and mild mental health needs, will demonstrate the value of strategic investment in employee wellbeing and how they are using volunteering as a mental health pathway. This session will explore how non-financial levers can support mental health, improve workforce flexibility, and create a more inclusive, engaged culture – maximising impact and driving progress, even when resources are tight.<br><br>**Sarah Appleby**, head of finance and **Helen Burdett-Wright**, chief executive, Teamwork Trust | **5C. Reframing our approach to risk**<br><br>In today's complex and rapidly evolving landscape, traditional approaches to risk often fall short of enabling real impact. This session invites finance leaders to rethink how risk is understood, communicated, and managed within their organisations.<br><br>**Caron Bradshaw**, growth and sector solutions lead, Charity Finance Group (CFG) | | **5D. When building for the future, start with the foundations – the timelessness of quality investing**<br><br>Financial markets have had many jolts this year as they digest the news on trade policies and their possible implications for economies. During heightened periods of market volatility, investors are often told to ignore the noise and focus on quality companies with strong fundamentals. But what does this really mean? This session will explore the key characteristics of quality investments, the sources of competitive 'moats', and why we believe this is both a business and investment strategy that is proven over many decades, and across many different industries and markets.<br><br>**Mike Topley**, head of sustainable portfolio management, Barclays Private Bank | **5E. Beyond grants: financing refugee integration through interest-free lending**<br><br>RefuAid's interest-free loan programme – the first of its kind for refugees in the UK – has quietly become one of the most innovative models in the charity finance space. Backed by new research from LSE, the programme shows that for every £1 lent, £5.66 is generated in economic return through increased tax contributions and reduced welfare dependence. In this session, co-founder Anna will share how the model was developed and scaled, the financial and social impact it's delivering, and what it means for rethinking how charities approach sustainable, high-impact funding.<br><br>**Anna Jones**, co-founder, RefuAid |
| 15:20 | Networking and refreshment break | | | | | |
| 15:45 | **Room closed for change of layout.** | **6B. Building resilient investment governance for charities**<br><br>In the current complex financial environment, establishing resilient investment governance is essential for charities to achieve sustainable growth and impact. This session will delve into how charities can design their governance framework to optimise investment decisions. Participants will gain insights into aligning investment strategies with organisational objectives and building resilience during uncertain times. Join us to discover how a well-structured governance framework can empower your charity to tackle challenges and capitalise on opportunities in the investment sector.<br><br>**Jennifer O'Niell**, head of not-for-profit investment and **Victoria Marsh**, head of not-for-profit business development, Aon Investments | **6C. Cyber shock, organisational response: lessons from the British Library**<br><br>In an era of escalating digital risk and increasingly sophisticated cyber attacks, organisations must be prepared not only to defend against threats, but also to respond effectively when disruptions occur. Robust business continuity planning is critical – yet often tested only in crisis. This session will explore the British Library's recent experience responding to a major cyber attack. Riyaz Somani will share how the organisation managed the operational fallout and adapted in real time, offering practical lessons for finance and operations leaders looking to build resilience into their response strategies.<br><br>**Riyaz Somani**, head of security, British Library | | **6D. Investment strategies and sustainable drawdown – finding the balance between giving and growing**<br><br>Many charities have long relied on income from their long-term investments to fund their work and meet their charitable objectives. As investments have become more global, income streams have fallen. At the same time, however, portfolio values have risen, as share prices have increased but this growth in capital is harder to access for day-to-day expenditure. This session will break down how charities can rethink their investment strategies to maximise drawdowns in a sustainable way.<br><br>**Lynne Lamont**, senior director, head of charities – UK, RBC Brewin Dolphin | **6E. From numbers to narrative: building stronger links between finance and fundraising**<br><br>Funders care about finances – but are your fundraising and finance teams speaking the same language? Drawing on recent research into what funders value most, this session will explore how better collaboration between fundraising, finance, and operations teams (with vital support from CEOs and trustees) can lead to stronger, more confident funding bids. Blending personal experience and practical examples, the session will offer actionable tips to help organisations get their financial storytelling right.<br><br>**Maddy Gazzard**, director, ImpactEd Philanthropy |
| 16:25 | Transit time | | | | | |
| 16:30 | **Final reflections and networking reception: insights, highlights, and connections**<br><br>Don't rush off just yet – join us for the final session of the day as our stream chairs come together for an engaging wrap-up conversation. This is your chance to hear key insights, standout moments, and cross-cutting themes from across the conference – all brought together in one dynamic discussion. Whether you're looking to consolidate your learning, share reflections, or connect with peers, this session offers a thoughtful close to the day's conversations. Plus, with drinks, nibbles, and a relaxed networking atmosphere, it's the perfect opportunity to wind down, exchange ideas, and leave inspired.<br><br>Chaired by **Jenni O'Donovan**, events director, Civil Society Media | | | | | |

> "A really enjoyable experience with good learning opportunities and thought-provoking sessions."
>
> Eileen Wentworth – RNLI

> "A positive atmosphere at a very well organised and attended event. There were some great and interesting speakers and I enjoyed the day."
>
> Jeremy Radley


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