

CIVILSOCIETY SPRING SUMMIT

BEYOND ADVERSITY:
SUCCESS STRATEGIES FOR
A POST-COVID WORLD

20 & 21 APRIL 2021



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- Charity Finance
- Fundraising and Technology

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WELCOME TO THE CIVIL SOCIETY SPRING SUMMIT 2021



Jenni O'Donovan
head of events,
Civil Society Media

Join us at the inaugural Civil Society Spring Summit 2021. This new virtual event will explore the role of charity leaders in guiding their organisations through the pandemic and rebuilding for the future.

To maximise the value and benefit of attendance when time and resource are limited, we have themed the content across three specialist streams which align with our magazines; Governance & Leadership, Charity Finance and Fundraising.

The sessions have been designed to provide guidance into the key issues impacting charities during the pandemic and beyond. You will be able to tailor your event experience to consume the content most relevant to you while also gaining insights from new perspectives.

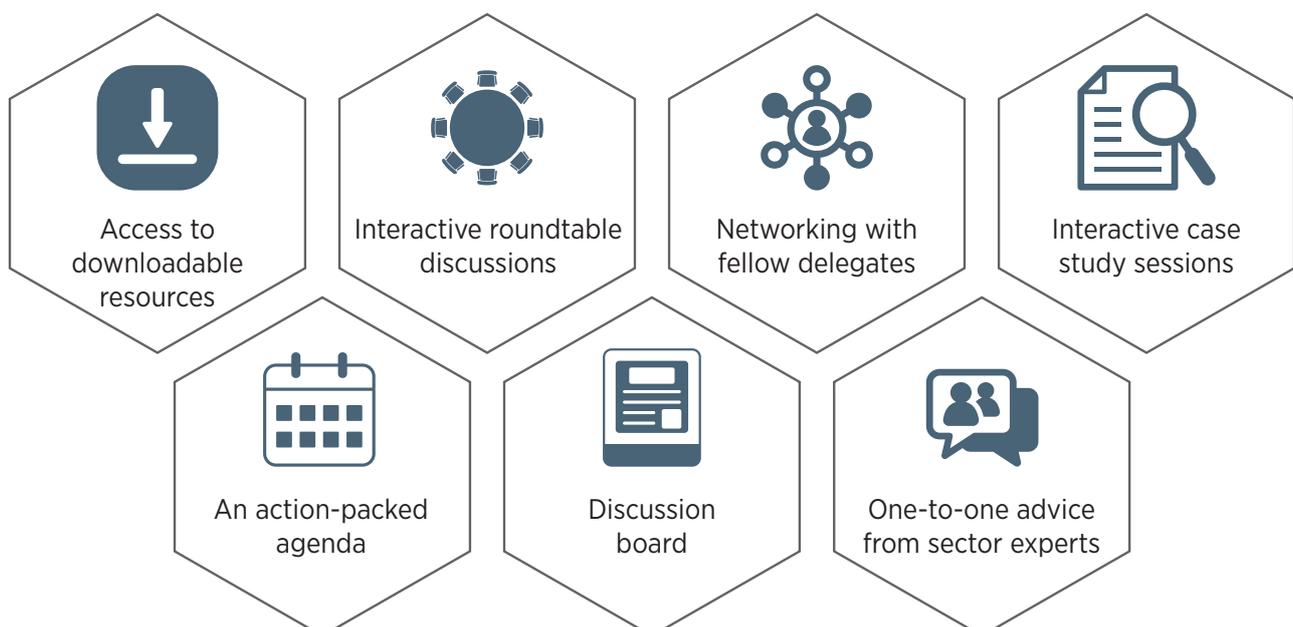
Our virtual event platform provides innovative networking opportunities, giving you the chance to connect with your peers as you would at an in-person event.

We hope you will join us for what promises to be an enjoyable and eye-opening conference.

ABOUT THE PLATFORM

After a huge amount of research last year we are now working with one of the best virtual event platforms on the market. SpotMe enables us to offer top-class live production and innovative networking opportunities.

We have now run two successful events on this platform and are confident it delivers the best experience for delegates.



Your ticket gives you access to ALL sessions. Pick and choose the most relevant sessions for you and your role. Or get a team ticket and bring your colleagues along too.

09:00	Time to familiarise yourself with the platform: update your matchmaking profile, connect your LinkedIn, explore the exhibition area and download expert resources.		
09:30	Welcome to the Civil Society Spring Summit – Matthew Nolan , chief executive, Civil Society Media		
09:35	Opening keynote – Why creating a culture of kindness should be every leader’s top priority We are living through unprecedented times with vast numbers of people working from home and being impacted by a variety of professional and personal challenges as a result of the pandemic. This creates new challenges for organisational culture and leadership. In this thought-provoking opening keynote, Kate Lee will reflect on the past year and what she believes constitutes a positive culture, how leaders can shape and sustain that, and why it is no longer a nice-to-have but a business priority. Kate Lee , chief executive, Alzheimer’s Society		
10:10	Transit time		
	Stream A – Charity Finance Chair: Tristan Blythe , editor, Charity Finance magazine	Stream B – Governance and Leadership Chair: Tania Mason , editor, Governance and Leadership magazine	Stream C – Technology and Fundraising Chair: Stephen Cotterill , editor, Fundraising magazine
10:15	1A. Demystifying sustainable investment As climate change and inequality rise to the top of the global agenda, more charities want to understand the impact that their investments have on the planet and the people that inhabit it. But the alphabet soup of “ESG” (environmental, social and governance) jargon can be off-putting, and we too often hear that our clients find it difficult to know where to start. Kate will talk about what sustainable investment means in practice and how we think about people and planet in our investment decisions. She will discuss the research on current best practice and the choices that charities can make to drive positive impact – as well as the approach that won ‘gold’ in the ESG Investing Olympics last year. Kate Rogers , head of sustainability & co-head of charities, Cazenove Charities	1B. Navigating the merger process – a legal perspective In this session we will look at; whether trustees should consider merger as an option, the process of merger and the legal steps involved; how charities can become merger ready and some top tips. Emma-Jane Dalley , partner, VVW	1C. What are Power Apps and how can they benefit your charity? This exciting online demonstration will explore how the Microsoft Power Platform with Dynamics 365 can be used as part of charities’ digital transformation; improving efficiencies, business processes and data analysis. This session will focus on no-code solutions which can improve supporter and beneficiary relationships. Practical examples shared will include how to achieve a single support view of all data in a single system, the benefits of using PowerApps for event management and membership sign-up, and using customer voice/pro forms for feedback requests. Tory Cassie , NfP Business Development and James Glover , head of solutions architecture, m-hance
10:55	Transit time		
11:00	Roundtable discussion: Building back better – what does the road to recovery look like? This interactive discussion, facilitated by a chair, will give you the opportunity to share challenges that your organisation has faced and learn from the experiences of your peers.		
11:40	Morning break: comfort/coffee break and time to visit exhibition		
12:10	2A. The end of the road for the traditional 60/40 portfolio? We discuss whether the 60/40 portfolio, the bedrock of charitable investment portfolios for the past four decades or so, is still fit for purpose as we enter into a potentially new regime for investment. We discuss potential challenges to the 60/40 – both now and in the future – and what alternatives trustees can consider to protect and grow their investment portfolio. Edward Donati and Ajay Johal , investment managers, Ruffer	2B. (12:10 – 13:00) Charities and Government: How can charities maintain and protect their independence in an age of culture wars? Now, more than ever, charities and government need to work together to address modern-day challenges such as mounting unemployment, widening inequality, the impacts of climate change and access to healthcare. But the mood music coming from some influential parts of the Conservative party suggests a great deal of suspicion about how charities work, and risks dragging the sector into a culture war. Is this having a chilling effect on charities’ ability to carry out their mission? Does it represent a threat to charities’ independence, and if so how can charities protect themselves? Chair – Russell Hargrave , senior reporter, Charity Finance magazine • Panellists – Rob Abercrombie , deputy chief executive, the Sheila McKechnie Foundation, Kathy Evans , chief executive, Children England, Michelle Lee-Izu , corporate director for development & innovation, Barnardo’s	2C. Case study: Successful stewardship during a crisis During lockdown All We Can managed to exceed their major donor income target by 88%. In this insightful session, Jaipreet Kaur will share how Covid-19 forced her to approach supporter relationships differently, what she believes has been the key to their success, while also sharing feedback from major donors. From adapting their communication strategy and style, to embracing technology and virtual events, join this session to explore how making small changes can have a big impact. Jaipreet Kaur , philanthropy manager, All We Can
12:50	Lunch break: comfort break and time to visit exhibition, participate in networking opportunities, organise 1-2-1 meetings etc.		
14:00	3A. Your investment policy statement & objectives – up to date and fit for purpose? Lynne Lamont , head of charities, Brewin Dolphin	3B. Developing a risk-ready board to support change and growth Penny Lawrence believes that a board’s role in uncertain times is to support risk taking. Reflecting on a challenging year at Refugee Action, she will share her experience of navigating the risks and opportunities posed by the pandemic and how the organisation is preparing to apply lessons learned in order to be fit for the future. Join this interactive session to discuss the principles for effective governance in a crisis, in particular how to develop an agile, risk-ready leadership approach Penny Lawrence , chair, Refugee Action	3C. Compliance in uncertain circumstances: a regulatory update and interactive Q&A with the Fundraising Regulator In these uncertain times many charities are facing complex decisions, not only about their fundraising activity, but what that means for future income generation and the important work they do. It is more important than ever to make sure that fundraising practices continue to be honest, open, respectful and legal. This session will provide a key regulatory update as well as plenty of opportunities for you to ask any questions. Charlotte Urwin , head of policy, Fundraising Regulator
14:40	Transit time		
14:50	4A. Search for income Charities used to be able to rely on reasonable levels of income generated by government bonds, cash and equities in their portfolios to support their operations. As these income sources have come under pressure over the last market cycle, how their portfolios should be structured has undoubtedly changed. What investments are now suitable? What are their risks? What are the benefits and pitfalls of total return and more globally diversified approaches? We examine the current state of markets for all ‘income’ investors, and look at how these portfolios could be invested for the future. David Goebel , investment strategist, Smith & Williamson	4B. Leading and motivating volunteers: My experience of managing the Royal Voluntary Service Covid-19 volunteer response This session will reflect on the vital role of volunteers during the pandemic, as well as the charity’s delivery of the biggest volunteer recruitment campaign since WW2: the NHS Volunteer Responders programme. From the innovative use of technology to recruit and deploy volunteers using the GoodSAM app, through to how Royal Voluntary Service has supported volunteers through the pandemic, Catherine Johnstone will reflect on what she has learnt from the past year and what the future has in store for volunteering. Catherine Johnstone MBE , chief executive, Royal Voluntary Service	4C. How to engage funders in digital as we return to the ‘real’ We are about to experience a rebound to the real. But as we return to the ‘real’, where does that leave our digital infrastructure and the momentum charities had to rapidly build during the pandemic? How do you protect and build on the progress your charity has made towards digital. How can you create a compelling case to funders to support this investment, and which areas should charities invest in to shore-up, and progress, their digital journey? Drawing on sector stories and funding research, Matt will explore how to prioritise your investment in digital and how to create an appealing and sustainable digital offer for funders. Matt Haworth , founder, Reason Digital
15:30	Transit time		
15:35	Beyond adversity: building resilience and coping strategies in the face of difficulties Former professional title holding boxer turned award winning charity campaigner, Dr Mark Prince is a model example of utilising your circumstances for change. All too familiar with overcoming adversity, the once drug abusing youth escaped a life of violence to become a world-renowned fighter. He later reinvented himself again after the death of his son to knife crime, establishing a foundation in his son’s memory. In this personal account of a truly remarkable life journey, Mark imparts wisdom on how to cultivate strength and resilience in order to reveal your true potential no matter what life may throw at you. Dr Mark Prince OBE , founder, the Kiyan Prince Foundation		
16:10	End		

Your ticket gives you access to ALL sessions. Pick and choose the most relevant sessions for you and your role. Or get a team ticket and bring your colleagues along too.

09:00	Time to familiarise yourself with the platform: update your matchmaking profile, connect your LinkedIn, explore the exhibition area and download expert resources.		
09:30	<p>Together we are stronger: lessons learned from collaboration in the face of Covid-19</p> <p>In this enlightening keynote we welcome the chief executives of three youth cancer charities to share the motivation behind and experience of joining forces. The organisations have formed an official partnership in a bid to increase their impact and better serve their beneficiaries. They will share what they have learnt and achieved so far, and why now more than ever collaboration trumps competition in every way.</p> <p>Kate Collins, chief executive, Teenage Cancer Trust, Frank Fletcher, chief executive, Ellen MacArthur Cancer Trust and Rachel Kirby-Rider, chief executive, CLIC Sargent</p>		
10:10	Transit time		
	<p>Stream A – Charity Finance</p> <p>Chair: Tristan Blythe, editor, Charity Finance magazine</p>	<p>Stream B – Governance and Leadership</p> <p>Chair: Tania Mason, editor, Governance and Leadership magazine</p>	<p>Stream C – Technology and Fundraising</p> <p>Chair: Stephen Cotterill, editor, Fundraising magazine</p>
10:15	<p>1A. The importance of the ‘S’ in ESG</p> <p>The pandemic has shown the large inequalities that persist at all levels of society across gender and race. Whilst the “E” has been long been in the limelight in ESG investing during the last 12 months, the debate has sharply moved on to how can investors help tackle social inequality and injustice via their financial choices. For many, this has involved greater scrutiny on where the goods and services are accessed and purchased, to how they invest their savings helping to ensure that they are part of the solution. Responsible and sustainable investment needs to capitalise of this new found vigour on the S in ESG to help alleviate some of the most deeply entrenched issues within society. In this session Ketan Patel will discuss how focusing on the “S” in investments can lead to long-term shareholder returns.</p> <p>Ketan Patel, fund manager, EdenTree</p>	<p>1B. What comes after Kids Company? – the legal role and responsibility of the trustee</p> <p>After a bruising three-and-a-half-year legal battle and the collapse of Kids Company, Camila Batmanghelidjh and seven former trustees have finally been cleared of mismanagement claims. But it is a stark reminder of the regulatory and legal pressures on trustees. Reflecting on this and other cases, Elizabeth Jones will share some practical guidance on fulfilling your legal duties as a trustee, managing compliance and staying on top of your governance practices.</p> <p>Elizabeth Jones, partner, Farrer & Co</p>	<p>1C. Why wouldn’t you use Direct Mail?</p> <p>In a post GDPR and pandemic changed world, charities have to leverage every channel and strategy available to maximise supporter acquisition and maximise lifetime value. Direct mail is more trusted, retained, shared and increasingly a trigger for digital activation. It is also enjoying unprecedented engagement with people spending more time at home. Scott will discuss why using reputable third party data and insight for multichannel supporter acquisition is proven to be successful and asks the question - why wouldn’t you use direct mail?</p> <p>Scott Logie, customer engagement director, REaD Group and chair of the DMA Customer Engagement Committee</p>
10:55	Transit time		
11:00	<p>2A. Investment themes for charities: 2021 and onwards</p> <p>The investment world has changed considerably since the start of the century. Investors have lived with near zero interest rates, little or no inflation and compressed fixed income yields since the financial crisis of 2009. This low interest rate/ low yield environment has brought about particular pressures for charities and trustees are confronted with a plethora of investment alternatives to try to secure capital growth and income from their portfolios. Emerging themes that we will explore will be green energy, AI and digitalisation, property investing post-pandemic and multi strategy investments. Our aim is to highlight solutions that investment professionals can offer to provide rising portfolio values, income and reduced volatility.</p> <p>John Devine and Kate Nathoo, senior investment managers, Charles Stanley</p>	<p>2B. Tackling inequity in funding for a fairer future</p> <p>The pandemic has shone a light on the importance of grassroots organisations supporting local communities, but also the imbalance of funding opportunities available to them. In its effort to support smaller black-founded charities, The Black Funding Network is turning the traditional funding model on its head with its membership-model which ringfences people and connections rather than a finite pot of money. In this session, Patricia Hamzahee will share her vision for a sector where fairer, more sustainable funding is available for organisations of all shapes and sizes.</p> <p>Patricia Hamzahee, co-founder, Black Funding Network</p>	<p>2C. Digital transformation in a post-Covid era</p> <p>Just as Covid-19 has turned the world upside down, so has it been the driving force for unprecedented digital acceleration. Ursula Dolton reflects on the opportunities presented by the pandemic and practical ways that charities can harness this momentum for change in order to thrive in a future that looks nothing like the past.</p> <p>Ursula Dolton, chief technology officer, British Heart Foundation</p>
11:40	Morning break: comfort/coffee break and time to visit exhibition		
12:10	<p>Plenary: How fundraising and finance align – CFO and CFO – 2 views of the same data</p> <p>That’s not a typo, there are two types of CFO in charities: Chief Financial Officers and Chief Fundraising Officers, and they need to work together to ensure alignment with and understanding of desired business outcomes, then work backward to decide trackable KPIs. Often working with siloed data across differing systems, this session will show both types of CFOs the power of data management and focus on delivering real time information to drive activities within your charity.</p> <p>Iain Goldmann, founder, Cloud Doing Good</p>		
12:50	Lunch break: comfort break and time to visit exhibition, participate in networking opportunities, organise 1-2-1 meetings etc.		
14:00	<p>3A. Shaping your investment strategy for a sustainable future</p> <p>Re-thinking risk:</p> <ul style="list-style-type: none"> • Drawing lessons from the pandemic about risk management • How does thinking about sustainability make you a better long-term investor? • Does modern portfolio theory help or hinder? • What does net-zero mean for a portfolio and how can we get there? <p>Simon Hallett, head of UK and European endowments and foundations, Cambridge Associates</p>	<p>3B. Learning from rapid growth in a time of loss and upheaval</p> <p>In conversation with the Centre for Charity Effectiveness (CCE), Ellie Orton and Ian Lush, chief executive and chair of the NHS Charities Together, share some of their experiences and learning from a year of rapid growth against the backdrop of the pandemic and all the challenges facing their NHS charity members, the NHS itself and wider society. Their reflections will stimulate thinking about strategic agility, teamwork and partnership at the top of an organisation, adaptive governance and leadership through crisis and into transition and reinvigoration.</p> <p>Caroline Copeman and Christine Fogg, consultants, the Centre for Charity Effectiveness at the Business School (formerly Cass) in conversation with Ellie Orton, chief executive and Ian Lush, chair, NHS Charities Together</p>	<p>3C. Donations and Fund Reporting: how to do it right to protect your charity today and into the future</p> <p>When it comes to fund reporting, there is a huge level of accountability and compliance required. This session will explore the practicalities and importance of integrating your CRM and finance systems to digitise your fund reporting and protect your trustees. From ensuring you are SORP compliant to streamlining your processes and becoming more efficient, join this talk to better understand how to future proof your finance function.</p> <p>Russ Emerson, business development manager – charities, and Jennifer Sims, solutions consultant, Xledger and Iain McSeveny, finance director, Medical Aid for Palestinians (MAP)</p>
14:40	Transit time		
14:50	<p>No Planet B: How can charities take the lead in confronting the climate emergency?</p> <p>Climate change is the defining crisis of our time. The United Nations warns that no corner of the globe is immune from its devastating consequences, and describes it as a race that we are losing, but one that we can still win. During the Covid-19 pandemic we have seen the far-reaching impact of charities supporting individuals and communities against all odds. And yet charities have been publicly criticised for failing to mobilise supporters into action on climate issues, with movements such as Extinction Rebellion gaining more traction. How can the sector harness that same passion and commitment to support the campaign against climate change and help to avert disaster? We have invited an expert panel of leaders and activists to discuss whether a rapidly mounting threat requires a new approach.</p> <p>Chair – Tania Mason, editor, Governance and Leadership</p> <p>Panellists – Prof Myles Allen, professor of Geosystem Science, University of Oxford, Clare Farrell, co-founder, Extinction Rebellion, Harjeet Singh, global lead on climate change, ActionAid International and Beccy Speight, chief executive, RSPB</p>		
15:50	End		

NETWORKING OPPORTUNITIES

You will have the chance to pose questions and comments to the speakers and there is an array of additional functionality that allows you to interact and network with speakers, sponsors, the organisers and each other, before, during and after the event.

1 DISCUSSION
Social media style feeds where you can post and answer questions with your fellow attendees

2 1 TO 1 NETWORKING
Want to get to know your fellow delegates? Click on the networking tab and you will be matched with a fellow delegate for a chat

3 ROUNDTABLES
Interactive roundtables that are facilitated by a chair to keep the discussion on track

4 PROFESSIONAL ADVICE
Visit our exhibition area to chat to professionals and pick up free resources and guides

BOOK YOUR TICKET

For a limited time only we are giving you the opportunity to attend **Civil Society Spring Summit** for a reduced rate! We only have limited tickets available at this price so book today to avoid disappointment. Your ticket will give you access to ALL of the sessions so you can pick and choose the most relevant topics. Bring your team to save even more!

Charity Ticket	Charity Team Ticket (up to four places)
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