



# Welcome to our 2024 ACO Annual Conference

I'm delighted to welcome you to ACO's 2024 Annual Conference - an opportunity to hear from peers across the ACO network, renew acquaintances and hopefully develop new working relationships at the same time!

This year we are addressing the theme "New Horizons." Over the course of the conference, we'll be reflecting on how charities in our sector - in challenging economic times - continue to adapt their financial/wellbeing support programmes to meet the evolving needs of their communities/audiences - demonstrating resilience, innovation and collaboration along the way.

During the programme we'll see a panel session share some of the key issues (both on a societal and organisational level) they currently face in delivering support – and how they are rising to meet these. We'll then have a group breakout focusing on the issue of stigma and how we can effectively tackle this significant barrier to accessing support.

Further sessions will look at how sharing grants data can improve financial support benchmarking, how AI tools such as ChatGPT can make a significant contribution in the charity workplace and showcase several impactful campaigns undertaken by ACO charities during the year.



We'll finish the agenda with a fascinating workshop around the continuing issue of staff burnout - how we recognise it and what tools we can employ to address this issue.

Closing out the conference will be our 2024 Annual Awards ceremonycelebrating the achievements of member charities across the network. This year we have had some outstanding nominations and agreeing shortlists and eventual winners in each category proved as challenging as always for our Judges Panel!

A final word of thanks goes to our conference sponsors - CCLA Investment Management - and Awards sponsors - Family Fund Business Services - for their invaluable support of this year's event. In the same breath, I'd also like to thank all our exhibitors this year - please do make a point of visiting their respective stands during the course of the conference!

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 2024 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 building lasting, long-term financial security and 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 sustainable investment - 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.

'New Horizons' is the theme for this year's conference and today we are speaking on 'Good Investment for a Better World' and the tools we can use to help drive change.

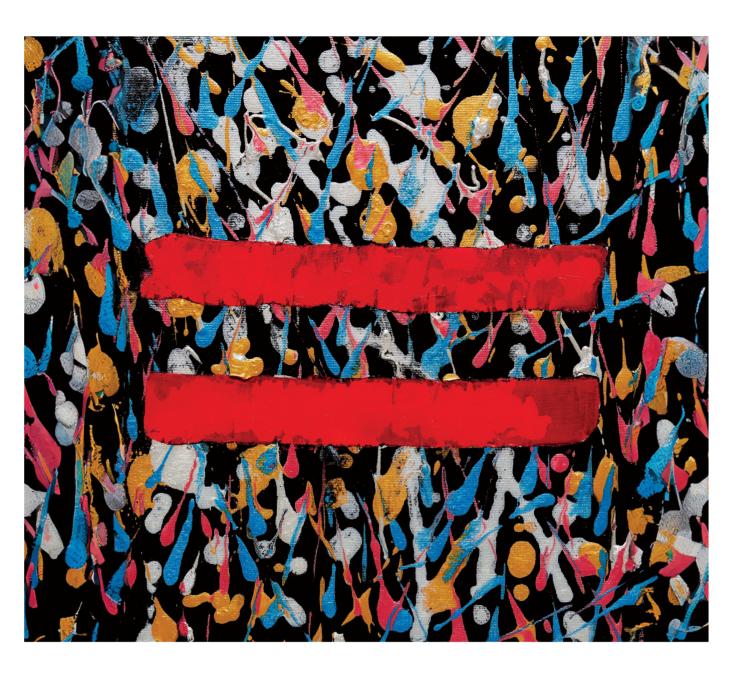
For more information please contact:
Elizabeth Carter at
Elizabeth.Carter@ccla.co.uk
Daisy Mannifield at
Daisy.Mannifield@ccla.co.uk

\*Charity Finance Fund Management Survey 2021, 2022, 2023.

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







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

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

CCLA Investment Management Limited is authorised and regulated by the Financial Conduct Authority. Image courtesy of Koestler Arts. *Equilibrium*, Kings Lynn Probation Service, Painting, 2022.



## **PROGRAMME**

SCAN ME

9.00am **Registration** 

9.30am

Introduction: Donal Watkin, Chief Executive, ACO

9.45am

Sponsor Introduction: Tools for Change: Good Investment for a Better World

Amy Browne, Stewardship Lead, CCLA

10.10am

New Horizons: The challenge of innovating financial and wellbeing support

- Chair: Jodie Gill, ACO Chair / Chief Operating Officer, caba
- Tom Lawson, Chief Executive, Turn2Us
- Shona Fleming, Chief Executive, Scotscare
- Cristian Holmes, Chief Executive, caba
- Anna Dearden, Manager Chemists' Community Fund

11.00am

**Break** 



## **PROGRAMME**



#### 11.20am

**Breakout Session: Tackling Stigma: Overcoming Barriers and Ensuring Access to Support Services** 

## 12.10pm

## How data is transforming the charity landscape

• Tania Cohen, Chief Executive, 360Giving

## 12.40pm

#### **Lunch Buffet**

## 1.30pm

## **AI in Action: Practical Tools for Charities Using ChatGPT**

• James Gadsby Peet, Director of Digital & Strategy, William Joseph

## 2.15pm

# **Campaigns Showcase: Celebrating Transformative Charity Initiatives**

- National Benevolent Charity: Home is Where the Harm is - Ali Russell, Chief Executive
- Vetlife: Neurodiversity Awareness Campaign: Bridging Understanding, Breaking Barriers - Kirstie Pickles, Trustee and Chair of the neurodiversity campaign group
- Licensed Trade Charity: Because Everyone Needs a Little TLC - Kayleigh Fox, Marketing & Fundraising Manager

## **PROGRAMME**



3.00pm

Break

3.20pm

Staff Burnout: tools to recognise and tackle the challenge for the charity sector

• Stuart Milliner, Head of Merrifield Consultants

4.00pm

**Closing remarks** 

• Donal Watkins, Chief Executive, ACO

4.05pm

**2024 ACO Awards Ceremony** 

5.00pm

**Drinks Reception** 

6:00pm

Close







#### **Amy Browne, Stewardship Lead, CCLA**

Amy joined CCLA's Sustainability team in 2020. She is responsible for leading and coordinating CCLA's stewardship activity across all areas, from public health and environment to corporate labour standards. Amy led the development of the CCLA Corporate Mental Health Benchmark and oversees the \$9.9 trillion global investor coalition on workplace mental health that supports it.

Amy was recognised by the Financial News' Rising Stars of Fund Management in 2023. She has 14 years' experience in investing for charities and non-profit organisations, having previously worked at Cazenove and Sarasin & Partners.



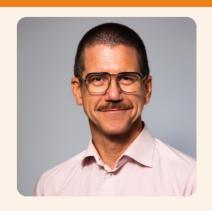
# Jodie Gill Jodie Gill, ACO Chair / Chief Operating Officer, caba

Jodie Gill is ACO's chair and Chief Operating Officer at caba, an occupational charity supporting the ICAEW community with everyday and exceptional life circumstances.

Joining the third sector in the early 2000's, Jodie has held several senior level roles within membership and charity. Before embarking on her journey in the third sector, Jodie garnered invaluable commercial experience within blue chip companies and professional service firms.







#### **Tom Lawson, Chief Executive, Turn2us**

Thomas Lawson has worked in the social sector since the early 90s in international development at UNICEF, HIV at Terrence Higgins Trust and NAM (the charity behind aidsmap.com), criminal justice at Prisoners Abroad and in youth work at the award-winning Leap Confronting Conflict.

Thomas joined Turn2us as Chief Executive in March 2019. He became a member of the Elizabeth Finn Homes board in April 2019, before being appointed as its Chair in August 2021. Thomas is interested in how the social sector can work with, and challenge, state bodies and companies to create an inclusive society in which everyone can thrive. He is passionate about the role that people with lived expertise can play in the future of the leadership of the social sector and in addressing the complex problems we face.



Shona Fleming, Chief Executive, ScotsCare
Shona Fleming is the CEO of ScotsCare, the charity
for Scots in London.

Shona is originally from Glasgow where she worked for Social Services until moving to London in 2002. At that time she joined ScotsCare, who in 2009 partnered with Borderline to provide a range of services to vulnerable Scots across London. Shona has been involved in managing and developing ScotsCare's client services to meet the complex needs of Scots in London.







#### **Cristian Holmes, Chief Executive, caba**

Cristian is caba's Chief Cxecutive. He writes and speaks widely on associations, professions and the not-for-profit sector. Cristian holds a PhD from the University of Leicester that explored associations and professions. Prior to joining caba in April 2020, he was Deputy Chief Executive and Chief Operating Officer of the British Association for Counselling and Psychotherapy, helping grow the organisation to 52,000 members. Before this he was Marketing Director for the Institution of Chemical Engineers.

He has worked in the mental health wellbeing sector for over 20 years. Cristian is a Fellow of the IoD and a Member of CMI.

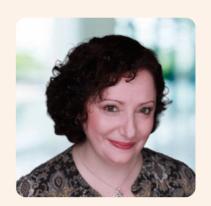


Anna Dearden, Manager, Chemists' Community Fund Anna joined the Royal Society of Chemistry (RSC) in 2018 after working for the Royal National Institute of Blind People for many years, developing and managing a variety of projects and services for people with sight loss.

Her current role is to ensure that her team provide relevant and timely support for RSC members and their families at what can be often difficult and challenging times in their lives. This is achieved through the hard work of Fund staff and dedicated volunteers. She links with other occupational benevolent funds to share ideas, and benchmark our processes and grants with others in the sector.







#### **Tania Cohen, Chief Executive, 360Giving**

Tania leads the organisation and oversees the delivery of their strategy and operations. Prior to joining 360Giving in March 2020 she had been working and volunteering in charities and grantmaking organisations for over 20 years, including roles as an analyst supporting organisations to improve performance. Tania has wide-ranging experience working with diverse organisations in the sector, as well as having held senior positions in a range of functions.



# James Gadsby Peet, Director of Digital & Strategy, William Joseph

With a deep focus on the charity sector, James Gadsby Peet brings a unique perspective to the challenges non-profits face today. Leading a specialised team at William Joseph, James is hands-on with the latest digital tools, including AI, ensuring that the solutions he offers are not just theoretical, but practical and effective.

His ability to identify successful strategies across various organisations makes him a trusted advisor for charities looking to leverage AI to enhance their impact.







# **Ali Russell, Chief Executive, National Benevolent Charity**

Ali joined the National Benevolent Charity in September 2019. Her previous roles include CEO of Longfield Community Hospice and CEO of New Brewery Arts, where she was awarded Business person of the Year by the Chamber of Commerce for redeveloping a former theatre into a boutique Arts Hostel. She has also been a Programme Director for Business in the Community. She has volunteered in a Women's Refuge and CAB and was a Community Worker in Merthyr Tydfil, and Rochdale.

These experiences have shaped her understanding of poverty and commitment to change. All lives with her husband and sons in Gloucestershire.



#### **Kirstie Pickles, Trustee, Vetlife**

Kirstie is a Vetlife Trustee and is Chair of the 2024 Vetlife neurodiversity campaign. She is an autistic Vet with over 25 years' experience in practice and academia and has a passion for veterinary mental health and neurodiversity. As well as specialist equine medicine training, she has also undertaken a postgrad certificate in counselling skills, MHFA instructor training, National Autism Trainer status and a coaching qualification.

She is currently juggling small animal ambulatory practice, a coaching/mentoring role at Harper Keele Vet School and her own neurodiversity and mental health consultancy business, Unedited Minds.







## Kayleigh Fox, Marketing and Fundraising Manager, Licensed Trade Charity (LTC)

Kayleigh is an experienced marketing professional with over a decade of expertise across a range of industries, including health tech, wellness, retail and hospitality. Having joined LTC nearly two years ago, Kayleigh took the lead on the "Because Everyone Needs a Little TLC" campaign, a project that has since become a central part of the charity's efforts. Alongside the marketing team at LTC, this innovative approach and passion for storytelling have helped elevate LTC's visibility and engagement within the licensed hospitality industry.



#### **Stuart Milliner. Head of Merrifield Consultants**

Stuart is the Head of Merrifield Consultants and has been a part of the charity sector for 12 years, recruiting into the sector for 7 years. He specialises in senior appointments for charities and other not-for-profits with a focus on Fundraising, Marketing and Communications, and Office Support/HR roles. He runs an incredibly thorough and transparent process to ensure a professional and personal experience.











Perkbox Vivup is excited to have partnered with The Association of Charitable Organisations (ACO), giving ACO members access to first class mental health and wellbeing solutions. With over two decades experience delivering meaningful employee benefits, we're proud to offer market-leading mental health support as part of our platform.

Our Wellbeing and Employee Assistance Programme integrates preventative care, early intervention, and expert clinical support whenever needed. With 24/7 telephone support available 365 days a year and access to face-to-face counselling.

We can also offer Your Care: an engaging health management platform that helps employees and beneficiaries cope with all of life's stressors. From financial guidance to GP support and effective CBT workbooks, our solutions are here to support people both in and out of the workplace.

Perkbox Vivup is a member of EAPA (Employee Assistance Programme Association) and our Wellbeing Director, Karl Bennett, is Chair. We are regulated by Care Quality Commission, and our EAP (Employee Assistance Programme) is APPTS (Accreditation Programme for Psychological Therapies Services) accredited.

#### How we can help your charity

Discover how we can partner with your charity and help amplify engagement, boost employee and beneficiaries' wellbeing, and address the key challenges being faced by UK organisations.

To discuss how Perkbox Vivup can support your organisation and beneficiaries, please contact: Tristan Rigby, Head of Wellbeing on tristan.rigby@vivup.co.uk | 07485 396993 www.vivupbenefits.co.uk

Tristan Rigby Head of Wellbeing **Karl Bennett Wellbeing Director** 





## **WRS**

At WRS Insurance Brokers, their experienced Charity Insurance team are passionate about the sector. For more than five 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 Gungor Baykan Head of Broking and Operations

## **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.

lan Charlton Business Development Director Samuel Bunney Account Manager





## **Charis**

Charis was launched in 2003 - with a simple purpose to support those in hardship. We have come a long way since then and are now the go-to administrator for many essential funds and grants on behalf of major organisations, authorities and charities. Each year we process over 200,000 applications and provide over £50 million worth of support to vulnerable individuals.

We are proud of the positive outcomes we make in people's lives. As a family-owned organisation that has been supporting vulnerable customers and households for nearly two decades we understand the challenges that families across Britain face. And we also understand the challenge that national and local charities and authorities face in getting help to people when they need it.

A full list of open schemes managed by Charis can be found on our website where you will find out how to apply for Warm Home Discount, energy-debt write off, and white goods as well as other help. We supply all the important criteria to help customers make a successful application. If anyone need any additional support our customer service team is available to answer any questions and help them through your application process.

Charis also has an Online Shop used by organisations across Britain to give crisis and urgent support such as emergency energy vouchers to individuals and families. If you are wanting to resolve some of the most immediate needs of your customers, please find more information on our website: https://www.charisgrants.com/shop/

Nick Harding Commercial Director Rory Tyrell Business Development Manager







## **Lightning Reach**

Lightning Reach helps grantmaking charities to assess and award applications up to 80% faster, reach and engage a more diverse range of beneficiaries by streamlining support through our award-winning platform. We use innovative technology, such as open banking and ID verification, to help organisations save staff time, reduce fraud and speed up administration.

The Lightning Reach portal also makes it easy for individuals to find and apply for a wide range of personalised support (including grants, local authority schemes, benefits, help with their bills and other vital resources), all in one place. Our vision is to empower anyone to access the support they need to build lasting financial resilience and wellbeing.

Founded during the pandemic, Lightning Reach has registered over 130,000 users and facilitated £12m in funding to individuals. We work with a range of grantmaking charities and other cross-sector partners including the Royal British Legion, Ben, Racing Welfare, Lambeth Council, Edinburgh Council, TSB Bank, PA Housing, National Energy Action and more.

Lightning Reach is backed by leading funders including the Joseph Rowntree Foundation, Big Issue Invest and Barrow Cadbury Trust, and recognised as one of NatWest SE100's top 100 UK social enterprises. Our portal was designed in collaboration with the sector and lived experience experts, and has featured in The Guardian, The Sun, MoneySavingExpert and other media.

Dave Farquharson Partnerships Lead

Ren Yi Hooi Founder and CEO





## **Merrifield Consultants**





Merrifield Consultants provides specialist recruitment services dedicated to supporting the not-for-profit sector, connecting people and creating communities to make a positive difference. With over 80 years of combined recruitment experience across our team, we take pride in placing exceptional talent in roles across fundraising, marketing and communications, memberships, finance, and office support. Our commitment to ethical recruitment, transparency, and building lasting relationships with clients and candidates sets us apart.

Merrifield Executive Search, is an extension of our recruitment services for not-for-profit leadership appointments focused on a personal and research-driven approach, ensuring we align the right leaders with organisations dedicated to making a positive impact.

We are committed to equality, diversity, inclusion and belonging, striving to create environments where everyone feels valued and safe. We genuinely care about our clients and candidates, forming true partnerships throughout individuals' careers and treating every role with the utmost care and attention.

Our mission is to build thriving communities by connecting organisations with passionate, cause-driven individuals. We are here to support not-for-profits in creating meaningful impact, and through our consultative approach, we aim to deliver the best possible recruitment experience, helping organisations in the sector find the right people to drive their missions forward.

**Stuart Milliner Head of Merrifield Consultants** 

Jess Bush
Senior Marketing Executive





# Relate

## Relate

At Relate we're here for every relationship. From romance to roommates, from colleagues to coparents. We're more than just therapists, we're people. We hear you, we feel you, we get where you're coming from. So, whenever you're ready, we can 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 you while you nurture and maintain your healthy relationships.

Relate offers a wide range of services tailored to meet the varied needs of our clients. From couples counselling and individual therapy to family therapy and support for young people, we've got you covered. Our team of highly trained professionals deliver compassionate and confidential support, ensuring you 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.

**Charles Darley CEO** 

**Rebecca Sylvester - National Contracts Manager** 

Siobhan Sargeant National Commercial Business Manager

Kate Wilson - National Contracts Administrator





## **B4B Payments**



B4B Payments is a proud member of the Banking Circle Group and a multi-award-winning financial services technology company offering Banking-as-a-Service solutions.

With over 18 years of payment expertise and recognition as a regulated EMI in the UK and EU, we are a principal member of Mastercard Europe and a partner of VISA Inc. in the USA. Our comprehensive solutions encompass BIN sponsorship, Payment accounts, FX and Card Issuing, reflecting our commitment to cutting-edge financial solutions.

Since 2006, we have been helping organisations save time and resources by changing how they disburse money and manage expenses. Your organisation will have the comfort of knowing that an award-winning business is right behind you whenever you or your service users need us. Whether you're looking to replace the petty cash tin, distribute payments to refugees and displaced people, or just say thank you to a volunteer, B4B Payments has a solution for your organisation.

We also have a long history of working with charities, from the YMCA to Fight for Peace, Thames Reach, Migrant Help, Belfast & Lisburn Women's Aid, Gigal, and Human Appeal. Many of them are at the forefront of working with vulnerable people, such as victims of slavery and trafficking or homeless people. This is where B4B Payments leveraged our proprietary technology, and our prepaid card and expense management are the perfect solutions.

Martin Polak Business Development Manager Josh Reid Marketing Executive





## **Russell Cooke**

Recognised as one of the leading law firms advising charities in the UK, Russell-Cooke's charity team works with hundreds of charity clients, from high profile and household name charities to small local charities and start ups, in a myriad of sectors including grant makers and poverty relief charities. We act for many benevolent funds.

We were proud to have assisted a number of benevolent funds, and the ACO, in preparing their submissions to the Charity Tribunal following the Attorney General's Reference of the Charity Commission's public benefit guidance into certain relief of poverty charities following the introduction of the 2006 Charities Act. The Tribunal specifically referred to the ACO's helpful submissions as the sector's umbrella body explaining how the benevolence sector works.

Our team of 16 lawyers advise across the full spectrum of governance and constitutional issues, mergers and restructurings, HR and employment, fundraising, data protection, property disputes and transactions, international structures and charity regulation, including Charity Commission investigations and other regulatory interventions, to provide a complete service tailored to the needs of charities and their trustees. We pride ourselves on working proportionately and flexibly to give the clear and practical advice needed to support effective decision-making.

Legal 500 which collates client feedback says of us: Approachable, highly intelligent, efficient and coordinated...informed by dep industry insight with a knack of finding resolution on even the most nuanced legal issue.

Andrew Studd
Charity Team Partner

Pippa Garland Charity Team Partner





## 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



# ACO ANNUAL AWARDS

## **Sponsored by**



Business Services

Family Fund Business Services (FFBS) makes grant administration simple. By providing charity clients with one point of access to thousands of essential products we take the hassle out of sourcing items and managing multiple suppliers. With ten years' experience of distributing essential items directly to beneficiaries, we understand the needs of vulnerable households.

#### How does it work?

Clients place orders through our unique online ordering portal, which are then fulfilled by our supplier network and delivered directly to the beneficiary. Our portal is designed to make distributing vital support easy, giving access to a wide range of essential items including white goods, furniture, energy vouchers, cashout and food vouchers.

#### Why choose FFBS?

Owned by a charity ourselves we understand the difficulties of trying to meet increasing demand in a landscape of higher prices and lower funding. With one consolidated monthly invoice, and pooling our buying power, we hope to make your funding go further. And every pound spent with us results in additional support for families nationwide as any profit generated is gifted to our parent charity, Family Fund.



100% of our clients said they were satisfied or very satisfied in our latest customer satisfaction survey. Why not get in touch today to find out how we can help you distribute support to people in need? Email:

business development @family funds ervices. co.uk



FFBS are proud to be the sponsor of this year's ACO Annual Awards, celebrating the achievements of charities and individuals across the ACO network who are making a difference every day. Supporting a charitable cause is what we do at FFBS and we are really pleased to be a part of recognising those who are working tirelessly to help people during these challenging times.

Mary Alcock - Head of Client Relationships





# ACO ANNUAL AWARDS -SHORTLISTED CHARITIES

## Sponsored by



#### **Small Charity of the Year:**

- Chemical Engineers Benevolent Fund
- Pharmacist Support
- The Teaching Staff Trust

#### **Charity of the Year:**

- Care Workers Charity
- Foothold
- Glasspool

### **Campaign of the Year:**

- CABA
- Pharmacist Support
- Vetlife

### **Charity Collaboration of the Year:**

- Cavell & The Burdett Trust for Nursing
- Charity for Civil Servants
- Lightning Reach

## Commercial Collaboration of the Year:

- Charity for Civil Servants
- Longleigh Foundation
- The OT Practice

### **Impactful Grant of the Year:**

- Foothold
- Pharmacist Support
- RABI
- The Book Trade Charity

## **Charity Leader of the Year:**

- Danielle Hunt (CEO, Pharmacist Support)
- Judith Smith (CEO, Teaching Staff Trust)
- Karoline Gerlich (CEO, Care Workers Charity)

### **Outstanding Achievement Award:**

- Judith Smith (Teaching Staff Trust)
- Nicole Woodward (Glasspool)

