



# Fundraising Convention 2019

1-3 JULY

FIRST-LOOK PROGRAMME

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Fundraising Convention is the largest event for professional fundraisers in Europe. Taking place over three days in July at the Barbican in London, the event brings together a mix of experience from the charity sector, and engages attendees through multiple sessions per day, within broad tracks.

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### MONDAY 1 JULY

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<b>09.15 - 10.15</b>	Opening plenary
<b>10.30 - 11.30</b>	Session 1
<b>11.30 - 12.00</b>	Break
<b>12.00 - 13.00</b>	Session 2
<b>13.00 - 14.15</b>	Lunch
<b>14.15 - 15.00</b>	Session 3
<b>15.15 - 16.00</b>	Session 4
<b>16.00 - 16.30</b>	Break
<b>16.30 - 17.30</b>	Session 5
<b>17.30 - Late</b>	National Fundraising Awards at the Brewery

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### TUESDAY 2 JULY

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<b>09.15 - 10.15</b>	Session 1
<b>10.15 - 10.45</b>	Break
<b>10.45 - 11.30</b>	Session 2
<b>11.45 - 12.30</b>	Session 3
<b>12.30 - 13.45</b>	Lunch
<b>13.45 - 14.45</b>	Afternoon plenary
<b>15.00 - 16.00</b>	Session 4
<b>16.00 - 16.30</b>	Break
<b>16.30 - 17.30</b>	Session 5
<b>17.30 - 19.00</b>	Delegate drinks reception

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### WEDNESDAY 3 JULY

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<b>09.15 - 10.15</b>	Session 1
<b>10.15 - 10.45</b>	Break
<b>10.45 - 11.30</b>	Session 2
<b>11.45 - 12.30</b>	Session 3
<b>12.30 - 13.45</b>	Lunch
<b>13.45 - 14.45</b>	Afternoon plenary
<b>15.00 - 16.00</b>	Session 4
<b>16.00 - 16.30</b>	Break
<b>16.30 - 17.30</b>	Session 5

The Fundraising Convention 2019 programme tracks are **Community, Events and Volunteers** **Digital Fundraising** **Individual Giving** **Legacies** **Partnerships** **Personal Effectiveness** **Philanthropy** **The Bigger Picture** **Trusts and Statutory.**

# Community, Events and Volunteers

**10.30**

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**“No we’re not merging...” The inside story of Alzheimer’s Society and Alzheimer’s Research UK’s Dementia Revolution collaboration**

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Come and hear an honest appraisal of the challenges – practical and cultural – that Alzheimer’s Society and Alzheimer’s Research UK faced working together to create the Dementia Revolution campaign for the 2019 Virgin Money London Marathon. Find out why it made sense, the barriers we faced and how we made it happen. Listen to Virgin Money’s feedback on what makes a successful proposal, learn about the successes we had together we wouldn’t have achieved alone and also what happens next! A must-attend session for anyone considering working in collaboration but who is unsure whether it’s the right decision or how to bring their organisations with them.

**Nina Ziaullah** – Dementia Revolution Campaign Director, Alzheimer’s Society and Alzheimer’s Research UK

**Lucy Squance** – Director of Supporter-Led Fundraising, Alzheimer’s Research UK

**Kat Cox** – Head of Sports Events, Alzheimer’s Society

**Jo Barnett** – Executive Director, Virgin Money Giving

**12.00**

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**A decade of evolution: strategies for success in community fundraising**

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Community fundraising has experienced a decade of evolution. This is the success story of how it became a focussed, reliable, authentic relationship fundraising stream. In this strategic session, you will learn which investments of money and effort have driven the steepest growth in Community, and unlocked the wider potential of these most fiercely loyal supporters. It’s a journey through sales, data, digital and management towards a future where people are still the largest success factor. Helen, Nicola, Chris and Lisa have 62 years of Community Fundraising experience between them, and together they have raised hundreds of millions of pounds.

**Lisa Aubrey** – Head of Community Fundraising, Save the Children

**Nicola Hunter** – Senior Volunteer Fundraising Manager, Cancer Research UK

**Helen Trenchard** – Consultant

**Chris Farrell** – Chief Executive, Cavendish Cancer Care

**14.15**

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**The changing face of aid: transforming businesses, transforming communities**

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As we move towards 2030 the world has a huge challenge; deliver upon the Sustainable Development Goals. The quest to eradicate poverty has been the goal of many governments, charities and individuals for generations, and now more than ever business is being brought to the fore as essential to meeting that goal. Christian Aid has launched ‘Salt’, an innovative network of business leaders and influencers united around supporting and developing transformative business practices domestically and internationally, which value people and planet without forfeiting profit. Delegates will explore the opportunities and challenges of developing a culture of pro-business supporter engagement.

**Samuel Williams** – Salt Business Network UK Manager, Christian Aid

**Helen Howe** – Salt Network Lead, Christian Aid

**15.15**

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**Lights, Camera, Capital Appeal!**

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In June 2017 Sue Ryder launched a £3.9 million capital appeal project to extend their specialist neurological care centre in Aberdeen. For 10 years the centre had no dedicated fundraising team in place and local profile of the charity and cause was low to non-existent. Learn how the feasibility study shaped thinking around the appeal, why community has played such a key role in delivering the target and top tips for growing community income outside of a capital appeal.

**Emma Leiper-Finlayson** - Capital Appeal Manager, Sue Ryder

**16.30**

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**From tiny acorns; how to grow your volunteer groups**

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Volunteer groups are a Community Fundraising staple. But charities are struggling to recruit new groups. In this session we will explore why, and how charities across the sector are approaching finding new groups - including throwing away the old models (who needs a chair, treasurer and secretary anyway?). Groups are increasingly made up of a younger, more socially-aware demographic, centred around one key supporter. In this session we will also cover how to find those supporters, and hear from a volunteer who ran their own fundraising group, what made that successful, and how you can replicate those successes for your own groups.

**Shona Richardson** - Community Fundraiser - Scotland, The Brain Tumour Charity

**Aaron Hearne** - Founder, The Liam Charity

**9.15**

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**Around the world in 8 campaigns; lessons from countries doing it right**

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Did you know that the best country for supporter relations is Lebanon, that Denmark rule the challenge events, that the US are pros at corporate, that no-one does digital like Italy, that the UK are the best at representing service users, that Portugal are the go to for major donors, or finally that Australia deliver the most engaging events? There is so much more.

We interviewed fundraisers who are experts in breaking into new and emerging charity markets; from WaterAid India to PETA Germany. Drawing from their experiences, this session will look at how successful innovation can come from a deep understanding of your cultural, audience and media contexts. As the UK fundraising climate is tougher than ever, we'll broaden our horizons and look across the globe for new ideas that are already working.

**Pete Grant** – Senior Planner, GOOD Agency

**Jenna O'Keefe** – Planner, GOOD Agency

**Daniel Magson** – Fundraising Campaigns Manager, MS International Federation

**10.45**

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**From good to great to grand growth - the ongoing development of community and events fundraising at Mind**

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Mind's Events, Community and Fundraising Development Team have achieved great success in the past seven years, growing from raising £250k with five staff in 2011/12 to raising over £10m with 35 staff in 2018/19. This case study will showcase the strategic, operational and cultural developments implemented to achieve this level of change, and will offer practical advice about the best ways to build a culture of innovation and success.

**Karen Bolton** – Head of Community & Events Fundraising Marketing & Innovation, Mind

**Alexa Hawkins-Bell**

**11.45**

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**Is it the end of the day for schools fundraising?**

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Fundraisers are struggling to see results from schools fundraising. And when teachers are stressed and schools are needing to fundraise for themselves, of course they don't want to think about your charity. So save your efforts and don't bother including schools fundraising in your strategy...

...unless you've been to our session to hear how you CAN make it work. We'll cover how to overcome recruitment challenges by targeting and segmenting your audience, the things you can offer schools to increase their remittance rates and most of all – an insight into teachers, supported by research, to inform your decisions.

**IoF Community Fundraising Special Interest Group**

**15.00**

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**Innovation from the inside out – lessons in optimisation from one of the largest events in the world**

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Pieta House is one of the most well-known and respected charities in Ireland. Their flagship event, Darkness Into Light, began 10 years ago with a humble 400 people walking 5km through Dublin's Phoenix Park... but has since grown to an event with over 200,000 participants walking in 180+ venues worldwide. During this session, we'll walk you through three years of analysis and the insights we gained through that process. We will discuss how Pieta House professionalised their fundraising strategy and as well as their event operations and reveal the BIG returns they got from those investments. So, if you are curious about how to properly tackle the analysis and optimisation of your mass-participation or bespoke event programme, then this is one you won't want to miss!

**Brian Higgins** – CEO, Pieta House

**Jillian Stewart** – Founder, Peer Works

**16.30**

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**Join for the event. Stay for the cause.**

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How do you turn newcomers into long term supporters of your cause? As low as 1.5% of our event participants are beneficiaries. Whilst we are known within the sector, the Whizz-Kidz brand is not a household name.

So how do we make our participants care? It's about identifying what makes you unique as a cause, as a team and as a brand. Take inspiration from others but don't copy for the sake of it. Own your individualism.

Through our experience, building a personalised supporter journey, we outline how we achieved this and hopefully give you tips to do the same.

**Paula McGoveney** – Group Head of Public Fundraising, Whizz-Kidz

**Cecilia Magill** –

**Senior Manager** – Events and Community Fundraising, Whizz-Kidz

**Larissa Simpson** – Events Fundraising Officer, Whizz-Kidz



9.15

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### Better touchpoints to raise more: practical lessons from a small charity

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Two years ago Mental Health Ireland began fundraising from zero, with the goal of bringing in individual supporters, fundraisers and corporate partners. By looking at every interaction...every touchpoint...the charity was able to increase its supporters, deepen their relationships, and raise more money; doubling income month by month. In this session we'll explore the journey from first interaction to retaining supporters; sharing what we've learned along the way and what you can implement in your organisation to boost fundraising the Mental Health Ireland way. With everything from strong strategies to #donorlove, you'll feel motivated and equipped with tips and tools to raise more money.

**Simon Scriver** - Board Member/Consultant, Making Connections/ChangeFundraising

**Jill O'Herlihy** - Head of Communications & Fundraising, Mental Health Ireland

10.45

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### Are you barking up the wrong tree?

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Product development is critical for any fundraising function, at charities of all sizes if you want to ensure long term and sustainable acquisition, retention and income. Whether you've got a long standing event or successful IG programme, in order to grow and keep up with every changing supporter needs, you need to continue to develop existing and new product offerings to meet your supporters needs better.

In this session the BHF and Blue Cross will share early mistakes they learnt from developing new products and share the current process they now follow when they are developing new or existing products which will give you some practical tips on how regardless of budget anyone in any team can do product development.

Audiences will come away less fearful of product development and with a clearer idea of how to do it cost effectively and scale events across the country.

**Tracey Chittock** - Head of Community and Events, Blue Cross

**Daniel Field** - Marketing Manager, BHF

11.45

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### Unlocking the potential of student fundraising

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Far from the media image of lazy and apathetic 18 year olds, university students across the UK are actually engaged and accessible advocates for registered charities. Between them, East African Playgrounds and HOPE for Children raise over £1,000,000 a year from students, whilst also building other income streams as a result of their student fundraising programmes. In this session we will be sharing the keys to this success; from developing a product, to realising the lifetime value of each supporter. We'll talk through case studies of events, products and campaigns whilst teaching you how to apply relationship principles to a one-off events market, making this a valuable session for all community fundraisers.

**Andy King** - Partnerships Manager, East African Playgrounds

**Vicky Wallace** - Fundraising Manager, HOPE for Children

15.00

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**Engaging with your service users and their families**

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For those fundraising in the charity sector, the opportunity to engage with charity beneficiaries - our service users and their loved ones - is like the Holy Grail. These are the people who can tell stories on our behalf, who have that all-important first-hand experience of what life was like before, and can tell at first hand the difference your charity's support and services makes to them and their families.

Many fundraisers experience challenges in reaching and engaging beneficiaries and their families, in some organisations contacting them may even be seen to be inappropriate or forbidden. But just as often, this group really does want to know. They want to help. They want to be able to express their gratitude for the support they or their loved-one has received. And if they knew how, they'd love to give something back.

Claire and Luke together have over 36 years in the charity sector, with careers spanning many different charity sizes, sectors and cultures. This interactive workshop is an opportunity to step back, consider and develop strategies and approaches to reach out to and strengthen engagement with your

beneficiaries in your own charity. You are warmly invited to share your own challenges at the workshop or to submit them in advance so that we have real examples ready to work through on the day.

**Luke Mallett** - Associate Director - Supporter Engagement Clic Sargent

**Claire Warner** - Communications & Fundraising Consultant

16.30

Session to be confirmed

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# Digital

10.30

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### Breaking down silos to give our supporters the campaigns and experiences they want

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We all know that fundraising is changing. Modern charities are bringing together the different parts of their organisations to deliver innovative, digitally led campaigns. These experiences make the most of campaigning, brand, awareness days and volunteering amongst others, to provide experiences that put the supporter at the centre of it all. In this session you'll hear from four of these forward thinking charities and how they've managed it.

**Andrew Taylor-Dawson** - Development Manager, Liberty

**Glyn Thomas** - Digital Consultant

**Sarah Tite** - Interim Director of Fundraising and Communications, Mental Health Foundation

**David Pearce** - Director of Fundraising & Marketing, Dignity in Dying

**Vicky Fallon** - Campaign Fundraising Director, Save the Children

**Matt Collins** - Managing Director, Platypus Digital

12.00

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### Lessons from the frontline of the resistance

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The world is changing, fundraising is changing. Driven by digital, civic participation is on the rise and no one talks about clicktivism anymore. As a result of Trump's Muslim ban 350,000 people donated over \$24 million online to the American Civil Liberties Union (ACLU) and the money continued to pour in as the public found a way of registering their dismay at Trump's presidency. Michelle from the ACLU will tell the insiders story of the ACLU's incredible fundraising performance since 2016, while Paul will share what we can learn from how the ACLU and others have firmly embraced movement building and digital to mobilise their supporters.

**Michelle Ehrhardt** - Deputy Director of Membership, ACLU

**Paul de Gregorio** - Founder, Rally

14.15

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### Changing the world (wide web)

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Visitors to your website are interested in your work. So why do few end up donating? Usually one of two reasons: 1. We have not asked them, or 2. We've made it too hard. Beate will show you how to fix both.

Through practical examples like the redesign of WWF Norway's website, you'll look through the eyes of your donors to learn how to inspire action.

Improving forms and landing pages frequently sees double digit increases in donations. Learn how to avoid common pitfalls, and bring #donorlove into your web design.

You'll learn techniques and tools to turn well-wishers into donors.

**Beate Sørum** - Founder, b.bold

15.15

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### How Pancreatic Cancer UK recruited 40,000 high quality leads from cold prospects on Facebook and developed a multi-step journey to regular giving

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Can you imagine trebling the size of your organisation's database in 6 weeks from one channel? Imagine doing it for a cost per lead of around 30p. Then imagine converting these leads so that the total investment paid back in under a year. This is what happened to PCUK when they tested a Facebook advertising funnel for their "Demand Faster Treatment" campaign.

In this fast-paced, practical digital acquisition case study will deep dive into the exact steps PCUK took to launch and optimize this break-through campaign. We will cover funnel mapping (including optimising for a GDPR world), how PCUK designed their testing matrix, the "creative hacking" process that made all the difference as well as rapid scaling and optimisation tactics. We will also look closely at the conversion journey from lead to regular giving using email and telephone.

**Julie Roberts** - Head of Mass Market Fundraising, Pancreatic Cancer UK

**Nick Burne** - CEO/Founder, RAISETHRU

**Chris Cox** - Senior Digital Manager, Pancreatic Cancer UK

16.30

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### Digital partnerships

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Details to be confirmed

9.15

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### M+R Benchmarks - what we can learn from 13 years of digital data

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The M+R Benchmarks have been running across North American giving for well over a decade. In this time they've collected millions of data points from hundreds of charities.

It's a lot of information, and each tiny piece adds a little more clarity to the trends that shape nonprofit digital programs. The averages tell us how nonprofits are approaching digital supporter engagement, and how those supporters are responding. And the outliers tell us where we might be going (or not...sometimes things are just weird).

This session will help us dissect tried-and-trusted tactics under a microscope to see what makes them tick, and ensure our telescopes are pointed in the right direction to spy the approaching developments that are already impacting our work.

**Matt Derby** - Vice President, Digital Advertising, M+R

10.45

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### Is voice the fundraising channel of the future?

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Voice technology is fundamentally changing the way we interact with our devices, helping us to save time and get things done quickly. We use it for a multitude of tasks - from searching for our favourite music to shopping online. But what are the opportunities for fundraising and how can your charity become a successful early adopter? The NSPCC and Addition by WPN Chameleon will explore the possibilities for using voice as an exciting new fundraising channel as well as share the results of voice fundraising in practice.

**Vicky Reeves** - Managing Director Digital & Deputy Group CEO, Addition by WPNChameleon

**Louise Corden** - Lead Digital Producer, NSPCC

**Adam Moore** - RSPCA

11.45

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### Eliminating risk in your GDPR strategy through research evidence

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In this session the RSPCA will take you through their approach to legitimate interest and consent in their GDPR strategy. We will explain how fastmap research informed RSPCA's evidence-based legitimate interest risk assessment that ensures compliance, reduces risk and leads to improved relationships with contacts. We will also discuss how research into optimising consent statements led to improved opt-in rates and helped to expand their database. Finally, we will look into privacy by design and how organisations can optimise their privacy policy to achieve targeted transparency.

**Adam Moore** - RSPCA

**David Cole** - Managing Director, fastmap

15.00

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**Digital transformation: another way**

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Many organisations are addressing digital transformation - how to become fit-for-purpose in a digital world. Not just in digital channels, but also digital tools, operations and culture. The process of transformation has been long and hard for many. As CIO of World Vision, Martin Campbell has the job of taking World Vision UK, part of the world's largest Children's charity, on its own transformation. Based on his own experience in with high-growth start-ups in financial technology Martin has adopted a new model for digital transformation and is already helping World Vision make the transition by leading a new "Digital Collective"

**Martin Campbell** - Chief Information Officer, World Vision

16.30

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**Effective charity videos, no matter what your budget**

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By 2020 around 80% of shareable online content will be video, is your organisation ready? Thanks to today's smartphone technology it isn't just the digital pros who can capture quality content, and it doesn't have to be expensive to keep up with these rapidly (and daunting!) changing consumer habits. If you do have some more budget though, then we'll hear about the best way to produce higher production video that works for fundraising.

You'll see case studies from both UK and international charities that are using video to support a variety of fundraising propositions, and how they are recruiting regular giving donors at volume using Facebook video.

**Nikki Bell** - Fundraising Consultant KEDA Consulting

**Saleem Tejani** - Head of digital films, DTV Group

9.15

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### Movember – innovation at the world’s most digital charity

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The Movember Foundation is one of the most forward-thinking charities, harnessing digital innovation to engage and support six million fundraisers worldwide, as well as deliver health programmes direct to the men who need them most. As a global charity partner of Facebook Social Good, it works with the social platform to develop new ways for participants to raise funds and awareness, and it is always experimenting with new channels, mechanics and online audience groups to drive greater engagement and action. Here they talk through their latest innovations to engage the supporters that are changing the face of men’s health.

**Paul Mitcheson** – Global Marketing Director, Cause & Brand Promotion, Movember Foundation

10.45

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### The evolution of dialogue fundraising – how Greenpeace are using messaging applications to reach out to new audiences and engage supporters

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Charities have relied on traditional dialogue channels to drive their growth for the last 20 years. But significant regulatory change has created a new landscape that the sector has to respond positively to. Greenpeace was the first organisation to use F2F in the 1990’s and is now the first organisation to bring dialogue into the digital space. Join us to learn how we have developed the use of Messaging Applications to engage with supporters in a bespoke, multi-faceted and scalable way with a focus on engagement metrics as well as commercial KPIs.

**Gráinne Callan** – Greenpeace

**Tony Charalambides** – Founder, Rapporo

11.45

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### Five things I learnt from working at a start-up and how to apply these to the charity sector

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Having been at the BHF, Dani recently spent a year working at fitness start up FRAME. Now back at the BHF, she’ll talk us through what we can all learn from this environment. This will include digital marketing, website optimisation, culture and team management.

**Dani Hughes** – Senior Digital Strategist & Planner, British Heart Foundation



**15.00**

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**5 tools and 10 lessons to help you with your digital transformation**

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Rhythmix have been on a remarkable fundraising journey over the last 5 years – a 10 fold increase in Trust and Foundation support, zero to 23% in un-ring-fenced funding and a reliance on lottery going down by two thirds. Here they'll talk us through 5 simple digital tools their amazing team uses to increase efficiency along with some non-digital tools and a few they abandoned.

On the external side of things the Church Urban Fund will talk through their learnings a year into their digital strategy. This will give those charities without a huge digital team and budgets for expensive consultancy, practical tips that they can implement tomorrow.

**Luc Stone** – Development Consultant, Rhythmix

**Ben Alonso** – Director of Fundraising, Church Urban Fund

**16.30**

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**Cyber frauds, hacks and data breaches**

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Losing access to a computer network, having funds stolen or suffering a data breach through a cyber attack can be can be devastating to a charity. The financial impact and harm to reputation can, however, be insured against with the right advice. This session will identify the main cyber threats and how to build cyber resilience.

**John Pennick** – Divisional Director, Berkeley Insurance Group

# Individual Giving

**10.30**

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### How to lose a supporter in 10 days

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Following on from 2018's popular session, 'what fundraisers can learn from Tinder', Nikki and Viki are back to share how to get the next part right - how to not scare your fundraising date away.

In this fun session we'll explore the various opportunities throughout your fundraising relationships where things can go, and have gone, horribly wrong; and what you should do instead.

Perfect for both organisations with small teams or very little budget, and big teams with fundraisers in the community; we'll be looking at everything from personal touches to strategic tactics to wow and delight supporters that can be implemented straight away.

**Nikki Bell** – Fundraising Consultant, KEDA Consulting

**Viki Hayden-Ward** – Head of Fundraising, British Youth Council

**12.00**

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### Supporter experience: a little less conversation, a little more action please

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With supporter recruitment becoming harder and more expensive and poor donor retention rates across the sector, it's no wonder that supporter experience has become such a hot topic for charities. There is a lot of conversation around how we should be delivering a better experience for our supporters, but no one seems to have cracked it yet. And in reality, with so many considerations, it can be difficult to even know where to start. This session will draw on years of experience working for charities and agencies in the sector, and share lessons from our current roles, to give you an insight into the challenges and opportunities around improving the supporter experience. We'll share some practical steps you can take to start improving supporter experience in your organisation today. And, you'll leave with a better idea of how to actually go about developing and implementing a strategy to improve supporter experience, and start reaping the rewards of a more engaged audience.

**Charlotte Forrest** – Head of Supporter Experience, Save the Children

**Lesley Pinder** – Head of Supporter Experience, British Red Cross

**14.15**

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### Can we change the face of face to face?

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Is face to face fundraising something we WANT to do or something we HAVE to do?

In this session we will explore how face to face fundraising at the NSPCC was transformed from a necessary risk to an integral part of our income generation strategy that led the way in best practice and supporter focused decision making for the organisation.

Together with the Fundraising Regulator, we explore how focusing on supporter satisfaction, high standards of compliance and winning over our charity colleagues has increased our rates of return by over 75% and help protect the reputation of fundraising. As the sector continues to prove its ability to self-regulate, face to face is often highlighted as a key area of vulnerability for compliance and complaint generation.

**Mark Kember** – Senior Fundraising Manager, NSPCC

**Sarah Fox** – Head of Adjudications, The Fundraising Regulator

15.15

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### Untapped – the latest chapter in the WaterAid journey

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Since 2014 WaterAid have been on a journey to change their strategy from one that simply seeks donations to one that aspires to create engagement with, and value for, supporters.

The strategy can best be evidenced in a series of focussed campaigns. The latest of these “Untapped” empowered the inhabitants of Tombohuan in Sierra Leone to speak for the global community who lack access to clean water and sanitation. The community created their own content. WaterAid enabled supporters to explore this through a series of apps, chatbots and digital tools.

The appeal raised £8,200,000 and recruited 20,000 new donors. The fundraising model employed by most charities is broken. For decades we have relied on the patience of donors to respond to appeal after appeal whilst we deploy the same messages in the same channels. The innate conservatism of the fundraising profession has made it its own worst enemy.

The engagement model philosophy of WaterAid is an ambition to create value for all supporters, before we ask for their money.

Untapped is the latest, and most successful in a series of campaigns that have run from 2014 to date.

We believe the lessons we have learned are not specific to WaterAid, nor to the development sector, but should be relevant to all fundraisers. We offer this session as a contribution to the debate “what next for fundraising?”

**Mike Colling** – Founder, MC&C

**Marcus Missen** – Director of Communications and Fundraising, WaterAid

16.30

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### Successful telephone acquisition post GDPR

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We’re busting the myths surrounding using the telephone to acquire new donors and develop existing relationships.

Great Ormond Street Hospital Children’s Charity and WWF UK invest in using the telephone, recognising the value it brings to fundraising and supporter stewardship programmes. Together with their telephone partner, NTT, they will present how an agency/charity partnership can support communication strategy development and fundraising, while maximising value and minimising risk. Top line results will be shared to demonstrate the value of telephone in the fundraising mix, with practical tips on how to utilise this channel successfully under the new legislation.

**Natalie Bailey** – Director, NTT Fundraising

**Amy Klein** – Direct Marketing Acquisition Manager, Great Ormond Street Children’s Hospital Charity

**Merlin Meyer** – Supporter Engagement Officer, WWF-UK

9.15

### Predictably Irrational? – behavioural economics and the future of fundraising

This session will explore the latest thinking in behavioural economics and decision science. It will change how you think about supporters and the way they engage with your cause. We'll share practical examples of how agencies from UNICEF to York Museum and the US Olympics team are using decision science techniques adapted by =mc to improve their fundraising. We'll cover:

- What is behavioural economics and what does it tell us about how we make decisions?
- How companies use behavioural economics to persuade us – and what we can learn.
- The EASIEST decision framework that you can adapt to your own work

**Bernard Ross** – Director, =mc consulting

10.45

### Not just another boring direct mail pack!

In a world where we are completely surrounded by compelling direct mail packs that land on our doorsteps - have we become desensitised? What makes us more likely to respond - or even respond at all? This session will cover how a DM campaign for a small charity that had remained relatively static, grew from c25k to 54k over a period of just a few years. We will share with you how to develop a collaborative approach between Direct Marketing campaigns, Events and Corporate that will; Increase response rates, increase average donation and harness a greater retention rate. Our case study will show how we breathed new life into what was otherwise - just another boring mail pack!

**Kathryn Burkitt** – Director of Income Generation, St Luke's Hospice, Sheffield

**Joasia Lesniak** – Senior Manager, Corporate and Events, St Luke's Hospice, Sheffield

11.45

### Ringin' true – creating authenticity in DRTV

We live in an age of reality tv and fake news. Consumers can spot anything that feels staged, dodgy or downright untrue. That includes what they increasingly perceive as 'manipulative' charity adverts. Never before has there been such a need to show authentic DRTV.

This session follows the journey of a groundbreaking MSF TV campaign. With no storyboard or script, we travelled to South Sudan and created it from scratch, evolving as we went. We share three perspectives from the people who were there: client, creative, camera. You'll leave armed with the tools to create your own authentic DRTV advert.

**Maria Phillips** – Director of Film and TV, WPNC

**Shona Barnes** – Campaign Manager, Medecins Sans Frontieres

**William Davies** – Film Maker, William Davies Films

**15.00**

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**The advantage of being small – how small charities can deliver a great donor experience, and what big charities can learn from it.**

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More and more fundraisers are talking about the donor experience – but our supporters aren't hearing it. It seems like we're taking notes, not action.

By winning the Best Donor Experience Award in 2018, Innovista showed that smaller charities have something to teach the sector. Small charities can provide memorable donor experiences, leveraging our size to our advantage to pursue low-cost and high-impact ways to give our donors joy.

This session will give concrete examples of how small charities are delivering great donor experiences, and will outline how big charities can get in on the act too.

**Robin Peake** – Senior Fundraising Executive, Home for Good

**16.30**

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**The old acquisition model is dead – a new era of supporter engagement emerges**

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Significant shifts have occurred within the UK environment over recent years that demand fresh perspectives on how we initiate and develop our supporter relationships. This expert panel argues that, while acquisition remains key, we're now in a new era for fundraising where charities must take a broader lens approach, looking far beyond linear, channel-based ROI models to offer a range of activities that will build positive supporter engagement. This interactive session explores the latest developments in direct donor recruitment and how we all can embrace a new philosophy that moves the focus from acquisition to creating relationships packed with wider potential.

**Dominic Will** – Managing Director/ IoF Trustee, HOME Fundraising / IoF

**Danielle Atkinson** – Head of Individual Giving, Plan International UK

**Scott Gray** – Head of Payments, Rapidata

**Brian Searle** – Managing Director, OMG Open Mobile Global

**Natalie Bailey** – Director, NTT Fundraising

9.15

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### No substitute for experience: experiential fundraising

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Experiential marketing is big business for corporates, but how do we create a model which will work for fundraising? Hear four charities' experiences in this field before the panel session on where we can go next.

**Gabriel Hartnell** – Fundraising Manager, WWF-UK

**Paula Radley** – National F2F Operations Manager, Greenpeace

**Nigel Mendonca** – Senior Experiential Marketing Officer, World Vision

10.45

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### A tote full of hope – everything you need to get your next big idea to market in just five days

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Are you worried that the ways in which you recruit new donors is becoming more and more limited?

Do you desperately want to try to new things but find it hard to dedicate resource to new activity with so much business as usual?

Do you need to gather rich insight on audiences, approaches and journeys quickly in order to shape future plans?

Unicef UK came up against some of these problems but found a way to work quicker and smarter to achieve their objectives.

**Ben Foster** – Director of Digital, MC&C

**Louise Lai** – Client Services Director, Open Creates

**Lucy Sandford** – Senior Direct Marketing Manager, Unicef UK

11.45

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### Building a global proposition

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What is a fundraising proposition? And how can it work across a global audience? World Animal Protection and Open will share their experience of what it means to develop a new proposition that would be embraced by global fundraising teams. Following a framework of 'discover, decide, do', you will learn how they got to the core of the charity's purpose; developed a new proposition and then launched it across nine fundraising markets. This session covers both the strategic and creative development process but also the value of managing and involving a wide range of key-stakeholders in such an important project. This session will challenge fundraisers to pause and consider the purpose of their organisation and how they can best communicate this to supporters through a single fundraising proposition.

**Virginie Kan** – UK Director of Fundraising, World Animal Protection

**James Dawe** – Art Director, Open Creates

15.00

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**Collaborative insight to create a customer-centric culture at Alzheimer's Society**

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The Alzheimer's Society were winners of the 2018 Team of the Year at the Insight in Fundraising awards. They showed not only how insight is driving the charity's supporter experience strategy, but also how supporter insight is engrained into the culture of the Alzheimer's Society and all decision making.

In this session you will hear from Alzheimer's Society's insight specialists about the journey undertaken, from embedding data analytics to ensuring the voice of the customer drives its fundraising, and how different insight methodologies can work together to improve performance. By ensuring closer collaboration between its insight teams, Alzheimer's Society has re-positioned the role of "data" and started to embed the voice of the supporter when planning fundraising campaigns and drive ambitious fundraising growth.

**Helen Jackson** – Customer Experience Manager, Alzheimer's Society

**Anita Connolly** – Fundraising Reporting & Analysis Manager, Alzheimer's Society

**Catherine Chalkley** – Customer Research Manager, Alzheimer's Society

16.30

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**Donor satisfaction. Measuring it and improving it**

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We're sure you know your response rates, conversion rates and retention rates. But do you know how happy your donors are with the way you communicate with them? And do you know how important this is?

In this session, we will share research that shows just how important donor satisfaction is and why everyone should be measuring it before Battersea Dogs & Cats Home talk about the different approaches they are taking to measure their donors' satisfaction.

They will then talk about what they are doing to improve satisfaction across their donor file, the change these actions have (or haven't) had in growing satisfaction and the impact they have had on donor value.

**Maddy Eastwood** – Senior Direct Marketing Manager, Battersea Dogs & Cats Home

**Roger Lawson** – Director, About Loyalty



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# Legacies

**10.30**

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**A legacy donor journey? No! Don't plan one**

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Donors have journeys. Do legacy prospects? No - and in reality most do not want one, which explains why so many legacies come from unknown sources. This session will probe into the dangers of assuming everyone wants to be on a journey and how such assumptions can destroy great campaigns.

**Richard Radcliffe** - Founder, Radcliffe Consulting

**12.00**

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**Why leave a legacy when you can live it?**

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While the charity sector invests millions in trying to normalise legacy giving, only 6% of the population do it. Legacy giving is a long way off becoming a social norm. In this session we'll ask how we can change this by engaging with the emerging cultural trend around end of life conversations. We'll also hear from a lifetime donor and legacy pledger, about her own hopes for her legacy and her experiences since pledging legacy gifts to numerous organisations.

**Ann-Marie Wilson** - Executive Director, 28 Too Many

**Elaine Cowan** - Fundraising Planner, GOOD Agency

**14.15**

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**D is for dead, how to talk about death and dying with dignity**

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As a part time fundraiser and part time funeral celebrant I spend a lot of time talking about death. Join me as we explore how to talk to bereaved families, how to honour their wishes - and what not to say, and how to get your whole charity on board. #YODO

**Gemma Rooke** - Development Manager Z-Arts

**15.15**

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**Legacies from scratch.**

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Having worked together at a large charity with a well-established legacy programme, Matt and Candy went on to work for smaller charities. In this session you'll learn how small charities can adopt the principles of large charities and create legacy marketing strategies from scratch

In this session, they will look at how you can embed a legacy culture within your organisation, how to transpose methods used by "Big charities" to be successful on a smaller scale, and how to make the most of limited resources.

They'll also look at the challenges (and advantages) you may face in building your programme whilst providing practical tips for you to take away and get you started

**Matt Smith** – Legacy Manager, London's Air Ambulance

**Candy Richards** – Legacy Manager, Wood Green, the Animal Charity

**16.30**

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**Legacy and In-Memory fundraising in multicultural Britain**

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As our society becomes more multicultural, fundraisers need to understand the relationship between an individual's faith and their attitudes towards legacy and in-memory giving. This session will provide the latest insight into this previously under-explored area.

Legacy Foresight will present their new research on the beliefs, rituals and behaviour surrounding death and remembrance in today's Britain. The research focuses on British Muslim, Hindu, Jewish and Sikh communities, based on interviews with three vital 'gatekeepers' - priests, funeral directors and solicitors - alongside desk research on the size and status of these key religious groups.

By gaining a deeper appreciation of the motivations and sensitivities of these growing populations, legacy and in-memory fundraisers can ensure that their strategies and messaging are appropriate and compelling.

**Meg Abdy** – Development Director, Legacy Foresight

**Nick Rand** – Associate, Legacy Foresight

9.15

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### Journey to a new legacy campaign

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In an ever crowded marketplace, making your legacy campaign stand out is an increasing challenge. You'll hear about two of the stand-out 2018 case studies, how Save the Children and Marie Curie developed and delivered their sector-leading campaigns and what they learnt along the way

**Jon Jacques** - Head of Legacies, Save the Children UK

**Nigel Gorvett** - Head of Legacies, Marie Curie

**Ian Boardman** - Creative Partner, Consider Creative

**Hugh Stockhill** - Head of Legacies, Bluefrog

10.45

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### Legacy Success at The Donkey Sanctuary: 50 years in the making

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The Donkey Sanctuary is one of the biggest success stories in the legacies sector. In this session you'll gain an insight into how they've achieved this, including how they've embedded a legacy culture throughout the organisation and how they forge powerful and unique connections with each and every supporter over their lifetime.

**Justin Wylie** - Head of Fundraising/  
Fundraising Consultant, The Donkey Sanctuary

**Dawn Vincent** - Director of Fundraising  
and Communications, The Mare and  
Foal Sanctuary

11.45

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### Loving your legators: why there's more to high value legacy stewardship than just getting lucky

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If you've ever wondered why the same charities seem to get all the big legacies or you've ever found yourself competing with your Philanthropy colleagues over who engages or stewards high value donors, then this is the session for you. Hearing from two charities who have had great success in this area, you'll discover why Legacy Giving and Philanthropy are two sides of the same coin and how taking a blended and collaborative approach to planned giving can deliver more big gifts and big legacies for your charity

**Sianne Haldine** - Head of Planned Giving  
Philanthropy, Cancer Research UK

**Joanna Ellams** - Associate Director, Individual  
Giving, Kew Foundation

**15.00**

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**Developing will writing products - one size does not fit all**

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In this session, you'll hear two different perspectives on developing will writing products for your supporters. You'll hear from Macmillan Cancer Support about their journey from a Discounted Will Writing Service to the launch of their mass market Free Wills Months. The Orpheus Centre Trust will share why a different model, a free will in return for a suggested cash donation, has worked for them - as well as their learnings from offering a discounted Power of Attorney service to supporters.

**Domino MacNaughton** - Head of Legacy Promotions, Macmillan Cancer Support

**Moira Lambert** - Head of Fundraising & Marketing, Orpheus Centre

**Sarah Greenwood** - Legacy Fundraiser, Orpheus Centre

**Lucy Compton** - Senior Legacy Promotions Manager, Macmillan Cancer Support

**16.30**

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**Debating the BIG questions**

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Do online wills present more of a risk than an opportunity? How worried should we be about Brexit? Can annual Legacy Income ever accurately be forecast? These questions and others will be debated by an all-star panel of legacy experts. Come and join the conversation.

**Allan Freeman** - Managing Director, Freestyle Marketing

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# Partnerships

**10.30**

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**The inside scoop**

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Join us for a vibrant panel discussion with corporate responsibility experts from some of the UK's leading companies.

**Sarah Eite** - Consultant, Eite Consulting Ltd

**Sasha Pauley** - Community Manager,  
Yorkshire Building Society Group

**12.00**

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**Perfect Pitch – selling your best partnership idea**

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Inspired by the popular Perfect Pitch sessions but with a new look, this popular session will see 3 or 4 charities pitch their best corporate partnership idea to you – a live audience – and, new for 2019, to an experience panel of CSR professionals. In this session you will get to see how other charities sell their cause, pick up great presentation techniques and be inspired to create exciting new partnership ideas. You'll also get the chance to hear the feedback from a panel of experts after each pitch to help you tackle that quick fire Q&A round and help you nail that next big opportunity.

**Lorna Taylor** - CSR Manager, Société Générale

**Joseph Clarke-Bland** - Charity & Community Specialist, Morrisons Supermarkets

**Sasha Pauley** - Community Manager,  
Yorkshire Building Society Group

**Katie Rees** - Business Development Manager,  
The Stroke Association

**Aimee Castle** - Business Development Manager, The Stroke Association

**Amber Madden** - New Business Corporate Partnerships Manager, Rays of Sunshine

**Andy King** - Corporate Partnerships Account Manager, Rays of Sunshine

**14.15**

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**If opportunity doesn't knock, build a door – spotlight on new business**

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Are you clear on the unique offer that your charity has for the corporate market? How did you identify your top corporate prospects? What approach have you taken to exploring your organisation's high level corporate networks? What type of cultivation events deliver the best results? These are some of the questions we'll be answering in this fast-paced session run by highly successful fundraising leaders, all of whom have worked directly at the coal face in corporate partnerships in a wide range of organisations (both large and small). If you're looking for new ideas for your business development strategy then this session is not to be missed!

**Hannorah Lee** - Director of Partnerships & Philanthropy, Age UK

**Anna Cooper** - Head of High Value Partnerships, Versus Arthritis

**Bea Theakston** - Head of Partnerships and Philanthropy, Crisis

**Sarah McCullough** - Deputy Director of Fundraising, London's Air Ambulance

**Mohini Raichura-Brown** - Head of Corporate Partnerships and Special Events, Anthony Nolan

15.15

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### **#Proudland: building a successful joint-branded partnership**

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In October 2017, Poundland chose three national children's charities (Make-A-Wish, Tommy's & Whizz-Kidz) to form its new #Proudland partnership. This represented a new, exciting opportunity for the charities assuming that an effective joint brand could be developed, drawing on the relevant strengths of each organisation to unlock the incredible potential of this national retail partnership. One year on, and with over £1million raised, we are continuing to grow our reach and develop our brand to break new ground - and this session will provide an overview and case study of how we achieved this.

**Joshua Trott** - Corporate Partnerships Manager, Whizz Kidz

**Rosie Leverton** - Corporate Fundraiser, Tommy's

**Andrea Ross** - PR & Charity Controller, Poundland

**Georgina Fuoco** - Corporate Partnerships Executive

16.30

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### **Corporate partnerships as organisational enablers - how can we use our skills to harness the power of corporate and charity relationships to create social change?**

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The power of convening is a hot topic. No one organisation can cure cancer, end poverty, stop cruelty or empower communities. To do all these things requires change with a new scale of co-creation and collaboration. The session will answer some key questions about how we make this long held vision a reality:

- How can we as partnerships professionals find the areas of our organisational strategy where a company is more than a cheque book?
- How can we make the organisation understand this concept and believe in our abilities to harness the power of corporates?
- Who has done this well so far and how did they do it?
- What do we need to watch out for in this new landscape?
- What skills will we need to develop?

**Eve Riddle** - Fundraising and Strategy Consultant



**9.15**

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**Winning more than your fair share of partnerships**

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Rejected for meetings, told you don't fit the criteria, failing pitches, falling at the final hurdle with staff votes. Sometimes corporate partnerships feel like a losing game. Yet, some charities seem to be winning more than their fair share of partners. Between them Ben and Nicola have won (and lost) partnerships with the UK's biggest companies and against each other. They recently decided to look at why in some situations they have won, and what they've learnt when they've lost. Some very similar tactics appeared. This is a unique chance to hear the inside workings from some of the most successful corporate fundraisers in the UK.

**Nicola Bott** - Head of Partnership Development, Teenage Cancer Trust

**Ben Swart** - Head of New Partnerships, NSPCC

**10.45**

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**Cultivating start ups**

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Europe is quickly becoming a hotspot for culture and innovation and UK start-ups in particular are dominating the Financial Times' top 50 fastest growing companies with Deliveroo in the top spot.

Thanks to technology, start-ups have the potential to move from an idea on a page to a multimillion pound business in just a few short years although of course for every one that makes it, many will not

So should charities spend more time looking at start-ups as potential partners? Our panel of charities will share their approach, the risks they face and how they mitigate against these, what they've learnt and their top tips for other organisations thinking about dipping their toes into this brave new world.

Speakers to be confirmed

**11.45**

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**Do boards actually work?**

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Often sessions on committees or boards are done by huge charities as an add-on to an already successful campaign. This session will show how Battersea built a new proposition and campaign around a corporate fundraising board - from scratch. Hear from the team, and the chair of the Board on their strategy, approach, successes, and failures in the creation of their #strayover corporate campaign.

Speaker to be confirmed

Battersea

**15.00**

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**Stronger sponsorship**

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Sponsorship is a competitive marketplace, and securing sponsorship is different to winning other kinds of charitable support. This workshop will help you understand your best sponsorship assets, and how to make them even more attractive to a potential sponsor. It will focus on packaging, prospecting and selling, helping you skill up for a stronger sponsorship offer.

**Alix Wooding** - Director of Development, Southbank Centre

**Justin Pledger** - Head of Corporate Partnerships, Southbank Centre

**16.30**

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**What does the future hold for corporate partnerships?**

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Friend or foe? A huge opportunity or a necessary offering? Cash cows or strategic partners? Corporate partnerships come in all shapes and size and are often talked about as a huge areas of potential growth for charities but what does the future really hold?

This very honest and lively panel session will see some of the best and most experienced fundraising leaders in the sector consider what the future holds for corporate partnerships.

Have corporate partnerships really changed in recent years? Are charities seeing a significant uplift in corporate income? If not, why not? Do corporate teams have the right skills and experience to deliver a step change in corporate partnerships? Are companies increasingly cutting out charities as a middle man and delivering their own social impact initiatives?

**Alex Hyde-Smith** - Director of Fundraising, Marie Curie

**Rachel Kirby-Rider** - Director of Income and Engagement, CLIC Sargent

**Desiree D'Souza** - Director of Partnerships and Social Impact, SeeAbility

**9.15**

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**Unblocking your corporate fundraising**

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What do you do when you have no idea what to do? What does good look like? Where can you get some advice on something really burning? The answer is here. We have six corporate fundraising experts ready to answer your burning questions in this session all about you.

Speakers to be confirmed

**10.45**

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**Small isn't just beautiful, it's successful too.**

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Many smaller charities do corporate fundraising differently, leveraging their agile approach to partnerships to achieve strategic, meaningful, and profitable relationships that others can only dream of. This session will see three charities talking about throwing out the typical approach to corporate fundraising, the failures they faced, before achieving their fundraising sweet spot, followed by a Q&A.

Speakers to be confirmed

**11.45**

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**Leveraging corporate intelligence as an asset for strategic partnerships**

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With focus on building strategic partnerships, what can you and your organisation offer that no one else can, and how can you monetise this for charitable benefit? In this session, we bring you three charities that have sought innovative and effective ways to 'sweat their assets' and intelligence in their cause area to great effect.

Speakers to be confirmed

**15.00**

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**How Helly Hansen won the RNLI**

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The RNLI secured a major corporate partnership with Helly by changing its approach to procurement. Find out how the Fundraising & Marketing Team got involved in the tendering process, the internal challenges they faced in changing ways of working, and how companies reacted to being asked to pitch for business. Hear how these new partners now make a contribution that extends way beyond fundraising to include significant gifts in kind, and joint marketing and safety campaigns. All charities have preferred suppliers who value their business, by working as an organisation you can utilise these relationships through appropriate asks at tender process. Whilst the RNLI is a large charity, the concept can be transferred to small and medium charities if it can be supported as a whole organisation.

**Jayne Clarke** - Head of Marketing, RNLI

**Stella Kubale** - Senior Corporate Manager, RNLI

**Richard Collier** - Chief Product Officer, Helly Hansen

**16.30**

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**The collaboration game**

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Companies want differentiation from their community investment programmes and to achieve maximum impact. Collaborations can be a powerful way to make this happen - so why aren't we collaborating more? This session will explore and showcase how charities have come together to win corporate partnerships that they couldn't have dreamed of securing alone. We'll share how they made it happen alongside some honest reflections on the challenges of taking this approach.

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# Personal Effectiveness

10.30

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### 21st century leadership? How do we chart our way through it to be a force for good?

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What do we mean by transformational? So often we talk about transformational leadership, culture and change? How do we meet the competing demands of being true to ourselves whilst working within the culture of our organisations? How do we endeavour to be a great leader and fundraiser whilst making time for our family and friends? And how do we navigate which voices to listen to as we continue to build our leadership experience? This session will offer a practical guide with the speakers sharing their personal journeys to find the answers to these questions.

**Virginie Kan** – Director of Fundraising and Marketing (UK), World Animal Protection

**Sonya Trivedy** – Fundraising consultant

12.00

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### Developing future fundraising talent and leaders

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If leadership is about people, then developing talent should be the number one priority for every senior manager. In fact it's been said that great leaders excel at two things: managing talent and managing upwards. Above all else, being excellent at unlocking and harnessing the potential of those around you. And yet, concerns about attracting, retaining and developing successful teams are major issues in our sector – with debates raging about the diversity of our organisations, the investment into talent development, our ability to recruit people from other sectors and hold on to our own best people.

This session gives you the opportunity to hear from an experienced panel of leaders as they share the challenges and opportunities they have faced in building successful teams.

And there will be plenty of time during this session to ask your own questions.

**Joe Jenkins** – Director of Supporter Impact and Income, Children's Society

**Jo Swinhoe** – Executive Director of Fundraising and Engagement, NSPCC

**Paul Amadi** – Chief Supporter Officer, British Red Cross

**Kate Collins** – Chief Executive, Teenage Cancer Trust

14.15

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### The importance and power of story-telling: but whose story is it, and who's doing the telling

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As a fundraiser 'story' is your most powerful communication tool. Stories can make the complex simple, we learn and remember more from story than facts and statistics. A powerful story told well will help your organisation cut through the noise, inspire the hearts and minds of supporters and inspire them to take action.

But whose stories are you telling? Is your beneficiary story one that you have the right to tell?

A good story is simply the truth well told, but in a charities desire to achieve its mission does the beneficiaries' truth become distorted in order to appeal more to supporters?

**Lucy Gower** – Director, Lucidity

**Esther Kwaku** – Founder/CEO, The Nerve Network

**Matthew Sherrington** – Director, Inspiring Action

15.15

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**Pascal's Wager to Ockham's Razor - the science and art of good decisions**

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With a unique Natural History Museum twist, we go in search of critical thinking tools to see how and why we make good, bad and brilliant decisions and how to maximise the reward when confronted by important choices. Whether recruiting, budgeting or devising strategy, this session invokes neuroscience, philosophy and interactive elements to help you “get it right” when you need to! We look at evaluating in the context of decision theory, thinking in bets, heuristics, logic, group dynamics and other areas of insight. For decision-makers interested in making better choices, understanding the way they think, and in delivering better outcomes personally and professionally – featuring exclusive, contemporary and thought-provoking content presented in an engaging and accessible way by a senior manager and consultant with over 25 years fundraising experience.

**Chris Trevor** – Head of Advancement Operations, Natural History Museum

16.30

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**Changing your mind-set to change fundraising**

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Are you a fundraising leader who's working hard but not having the impact you want? Do you feel overwhelmed with juggling today's firefighting and tomorrow's ambitions? Are challenges leaving you feeling drained, rather than helping you grow? You are not alone. And it need not be this way. Join a conversation with Charly, Executive Coach and Trainer, and Chloe, a Fundraising Strategist who experienced burnout, to gain tools and tips to help build your resilience, put meaning and fun back into your everyday, and ultimately get yourself back into the driving seat to lead the change in fundraising.

**Chloe Amstein** – Fundraising Strategist, Chloe Amstein Consultancy

**Charly White** – Executive Coach and Trainer, Vivid Leadership

9.15

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### Assert your rights – recognising the diversity you bring

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In the wake of the #metoo movement people are speaking up and asserting their rights. Diversity is being recognised for its importance. However, making yourself heard and recognised is not always easy. Sometimes we hold ourselves back, sometimes our inner voice gets in the way, and sometimes we just don't know how to be assertive. We can't promise structural inequality or bias can be overcome with assertiveness, but we can help you to feel more confident to push yourself forward and get the recognition you deserve. We'll be sharing our experiences and established tools, which you can use straight away Ruby will be sharing her personal experiences and lessons learned. Yvette will introduce practical techniques and tools, proven to build confidence. You will learn to value yourself, how to be assertive and identify simple changes that can make a big difference.

**Yvette Gyles** – Assistant Director,  
The Management Centre

**Ruby Bayley-Pratt** – Fundraising Policy  
and Research Manager, British Red Cross

**Fiona Pattison** – Senior Planner, GOOD Agency

10.45

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### Better public speaking for good

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As a fundraiser your public speaking is so important. How you deliver your message can be the difference between someone donating, volunteering, or doing nothing. We can all benefit if we have better public speakers working in the charity sector. This session will give you tips and tricks to improve your public speaking. You'll come away with the tools to feel more confident and effective the next time you make a presentation to your supporters, your co-workers or your Board. Everyone starts off scared of standing in front of a room full of people...this session is your first step towards eliminating that fear.

**Simon Scriver** – Board Member / Consultant,  
Making Connections / ChangeFundraising

11.45

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### Confidence, control and clarity – the power of mentoring and how to transform your fundraising career

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This session is all about taking control of your own development as a fundraiser, enabling you to identify clear career goals and know what you're going to do about getting there. You will hear case studies and have a chance to question three fundraising peers who will share their stories of transforming their approach to fundraising with the help of a mentor and their own drive and determination. You will come away with a new sense of clarity and purpose alongside a host of practical tools and advice which you can apply to give you the confidence and inspiration to be proactive about your development.

**Susan Morgan** – Director, Tony Elischer  
Foundation

**Andy King** – East African Playgrounds

**Nick Crossley** – CLIC Sargent

**Fern Hayes** – Interim Head of Fundraising, Sue  
Ryder South Oxfordshire



15.00

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**Do you feel like an imposter?**

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Do you ever sit in front of a potential corporate donor and wonder when they will suss that you don't know what you're doing even though you do. Or turn up to that huge event you've organised thinking I'm only fifteen in my head why on earth have they allowed me to do this? You may be suffering from fundraisers' imposter syndrome. The feeling that you're a fraud, you'll be found out soon and that every job you consider is too big for you. This session will help you give those fears and give you ways to prevent and overcome them.

**Caryn Skinner** - Director, Sharpstone Skinner

**Lizzi Hollis** - Corporate Partnerships Manager, St Mungo's

16.30

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**How improv can make you a better fundraiser**

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How good do you think you are at Communicating? Collaborating? Innovating? Would you do these better? Do you like to play? Then this is the session for you. From the combined facilitation of TEDx Speaker (and former IOF Convention Board Member) Shonali Rodrigues, and the Directors from Cast Iron Theatre Andrew Allen & Michelle Donkin, we bring you Convention's most unconventional session. Using easy and engaging games you will be invited to practice the theories of improvisation. Improvisation is both empowering and inspirational. It helps you to collaborate, empower teams and improves listening, problem-solving and presentation skills. But don't take our word for it - come and see for yourself!

**Shonali Rodrigues** - Creativity Catalyst, Cast Iron Theatre

**Andrew Allen** - Co-founder, Cast Iron Theatre

**Michelle Donkin** - Co-founder, Cast Iron Theatre

9.15

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**The compound effect - how to raise a lot more money through incremental gains**

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The human brain is highly susceptible to the lure of the quick fix. The trouble is, get rich schemes rarely work. And searching for them distracts and demoralises. In reality, most success comes as a result of many small improvements applied over time.

When you search for the inches instead of the miles, you discover they are everywhere. Inspiringly, the small shifts multiply together to create the big shift in results that you really want. Rob shares examples of fundraisers growing income through this concept and shows you how to apply the concept in your own work.

**Rob Woods** - Director, Bright Spot Fundraising

**Joy Jones** - Senior Community Fundraising Manager, Diabetes UK

10.45

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**Understanding power and privilege**

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The objective of this session is to confront systems of power and privilege, identify common situations where privilege is not acknowledged, and the impact this has on others

**Lucy Caldicott** - Founder, Changeout

**Rebecca Olokun** - Fundraiser - Philanthropy Team, CRUK

**Shaista Aziz**

11.45

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**Culture and inclusion**

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Details to be confirmed

**David Mbaziira** - Culture and communications consultant

15.00

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**The sector's diversity challenge**

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Details to be confirmed

**Elizabeth Bananuka** - Communications Consultant

**Leon Ward** - Programme Manager, First Give

**Lucy Caldicott** - Founder, Changeout

**Mandy Johnson** - Founder, Great Charity Speakers

**Sarah Washington** - Head of Major Gifts, Actionaid

**Fiona Pattison** - Senior Planner, GOOD Agency

16.30

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**Why volunteer when you work for a charity?**

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Do you ever wonder what more you can do to give back, advance your career and/or meet like-minded people from the charity sector? In this session several voluntary Chairs of the regional IOF Committees will share what they have learnt, gained and valued about volunteering for the IOF whilst also balancing busy day jobs.

**Mandy Johnson** - Founder, Great Charity Speakers

**Kate Carroll** - Head of Charity, Making a difference locally

**Paul Courtney** - Development Director, Farms for City Children

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# Philanthropy

**10.30**

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**How to be major donor ready**

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You've got projects to fund and a list of potential major donors to engage. But what about you? Are you major donor ready? Join us at this practical session to learn the skills and behaviours that will get you ready to bring in the gifts you want. You'll come away understanding the key mindshift change you need to make to be successful in fundraising, the tools to speak your donor's language and therefore build rapport, and techniques to raise you or your team's profile internally so you can secure the best opportunities for your donors.

**Michelle Stein** - Director of Philanthropy & Partnerships The Children's Society

**Anna Sheinman** - Fundraising Consultant

**12.00**

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**Major donor fundraising - a dark art or the art of being a human being?**

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Effective relationship fundraising is seen as the holy grail for building a major donor programme, but as a concept it can feel nebulous. If trust is an essential component of giving, what are the practical steps to build it? Is it just about being nice to people? Do you need to be deferential? And how do you deal with difficult personalities? This session will apply some of the principles of performance to building effective and lasting donor relationships. It will focus upon the nature of status in relationships, finding your donor's motivation, playing your objectives and operating with emotional intelligence.

**Sarah Jane O'Neill** - Major Donor Fundraising Consultant, SJ O'Neill Consulting

**14.15**

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**What donors want - live podcast recording**

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What donors want - a podcast by I.G. Advisors - features fresh, dynamic (and slightly irreverent) conversations about major gifts fundraising with donors themselves. With past guests ranging from the Bill & Melinda Gates Foundation, to Comic Relief and DLA Piper - the show offers a behind-the-scenes view into major gifts philanthropy, and is filled with unique insights.

**Rachel Stephenson Sheff** - Advisor, I.G. Advisors

**Emily Collins-Ellis** - Senior Advisor, I.G. Advisors

**15.15**

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**Fundraising from the Muslim community - a crash course**

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Muslim philanthropy is one of the fastest growing giving markets in the UK. Household UK brand names have successfully targeted Muslim consumers for a number of years (e.g. through Ramadhan aisles, Halal butchers). Whilst these retail brands have tapped into the Muslim 'pound', the mainstream charity sector have been slower in actively engaging Muslim support. This session provides a crash course on fundraising from the Muslim community. It will address the dynamics related to the Muslim giver, including an overview of the basic tenant of charity in Islam, the Muslim giving landscape in the UK, the media landscape used for targeting Muslims and the core essentials of Muslim philanthropic psychology.

**Haseeb Shabbir** – Head of Marketing and Business Strategy Division, University of Hull

**Ikhtlaq Hussain** – Head of Major Giving, Orphans in Need

**16.30**

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**The best things come in small packages: making major gifts work in small charities**

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Any small charity can build relationships with major donors by using tenacity and creativity. This session will walk you through how to identify potential major donors, how to build relationships with them, and will share practical examples and inspiration from a variety of small charities that are successfully using their strengths to engage major donors. It's also an opportunity for more established fundraisers to get back to basics and be inspired by the simple but effective ways that small charities are building strong relationships with donors.

**Christine Harris** – Philanthropy Manager, London School of Economics and Political Science

**Lindsay Harrod** – Senior Project Manager, The Foundation for Social Improvement

**9.15****Highs, lows and hard hats – the truth about capital campaigns**

What do you wish you'd known before you started a capital campaign? Hear from a panel of experienced fundraisers who have led capital campaigns about their experiences. Learn about how they engaged supporters in complex and multi-year builds with changing time tables and budgets, how they built internal support from colleagues, how fundraising can take the lead with the vision and delivery of capital projects and how they maintained revenue income throughout the capital campaigns. Our panel share their best bits, their worst bits giving you some really practical tips on how to approach and run a capital campaign.

**Sophie Henstridge** – Senior Trusts and Foundations Manager, Royal Opera House

**Alexandra Rowlands** – Senior Development Manager, Royal Opera House

**Heather Manson** – Director of Fundraising, The Prince & Princess of Wales Hospice

**Sharon Oloan** – Director of Fundraising, Maggie's Caring Cancer Centres

**10.45****Conversations with donors – how philanthropists are transforming fundraising at Oxfam**

If you want to know ask ... The Philanthropy & Partnerships team at Oxford have spent the last two years conducting in-depth interviews with individual philanthropists and philanthropy experts, and with Grant Managers, Executive Directors and Trustees at Trusts & Foundations. They are now using the results of these research projects to revolutionise the way they work.

Hear from a researcher and a fundraiser about what they found out, how the organisation adapted to the findings and the impact the changes have had and how you can apply this to your work.

**Tillie Peacock** – Manager - Partnership Insight, Oxfam

**Pete Hall** – Head of Trust and Foundation Partnerships, Oxfam

**11.45****How to design and deliver the right mid-level programme for your organisation**

Many charities are planning to invest in mid-value fundraising programmes but are struggling to design and deliver an approach that works for them. In the past, this group have been somewhat overlooked as fundraisers concentrate either on the mass-market supporter base or the top-end major donor caseload and have had no natural home as a result.

This session will help you decide what approach you should take in designing a mid-value donor programme that suits the needs of your organisation, your donors and funding requirements. This session will offer insight into two successful but contrasting mid-level fundraising programmes as well as an opportunity to ask questions from experts.

**Kate Hogg** – Director, Beneficial Fundraising

**Kate Kellaway-Moore** – Head of Partnership Hub, Oxfam

**15.00**

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**Trustees and fundraising - embedding fundraising and realising their full potential**

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We all know the well-rehearsed maxim about Boards 'give, get or get off' but how do you ensure that Trustees are giving and actively engaging with philanthropy. How do you get the most from your Board and their skills and networks? Learn from the experts on what has worked, what they have tried with and how Board journeys and involvement can enhance fundraising and the work of your organisation.

**Tara Leathers** - Deputy CEO,  
The Princes Trust

**Joanna Newell** - Head of Philanthropy,  
Southbank Centre

**16.30**

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**Hand across the water**

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Are American donors really so different from those in the UK? The USA is sometimes portrayed as a place where people don't even have to be asked before they bestow large philanthropic gifts on non-profits. However, in reality the situation is much more complicated and the challenges of fundraising in the US are just as engaging as those in the UK - but different. This panel brings together a wealth of fundraising experience to discuss the similarities, variances and learning that can be derived from a comparison of practice between the UK and the US.

**Angela Bowen** - Director of Development,  
Imperial College

**Lianne Howard Dace** - Community  
Fundraising Lead, Christian Aid

**Andrew Watt** - Senior Principal, Accordant  
Philanthropy

**Nina Botting Herbst** - Director of Individual  
Giving, National Trust for Historic  
Preservation (US)



9.15

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**Valuing senior volunteers in the world of philanthropy and special events**

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In 2015 the MS Society launched a £100 million appeal to fund MS research, and a Philanthropy and Special Events Team was introduced to the organisation to support this appeal. Since then, a successful and growing giving club has been developed with the support of a volunteer advisory board and a programme of special events has been established to support the work of the team, from small cultivation events to a flagship £1 million event.

This session will look at how the MS Society has grown philanthropy and special events income and how working with senior volunteers has ensured its success.

The MS case study will prompt a discussion of the value to organisations of introducing or growing a philanthropy/special events income stream, how to embed a special events team with a philanthropy team, and the importance of establishing excellent volunteer relationships to support both philanthropy and special events.

**Catherine Royall** – Philanthropy Officer, MS Society

**Zoe Dudley** – Philanthropy Officer, MS Society

10.45

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**Thank you seems to be the hardest word(s) – how to wow your donor with the right thank you**

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We often resort to tried-and-tested methods of saying thank you, such as handwritten letters or plaques. There's so much demand to bring in new funding that thanking doesn't always get the time and attention that it deserves. This session will share examples of effective thank-yous and the impact they have had. We will help you work out what is the right thank you for a specific donor depending on their motivations – whether they are a philanthropist, trusts/foundation or company, and offer you innovative ways to say thank you that are ready to use in your organisation.

**Laura Solomons** – Head of Donor Relations, The Sutton Trust

**Saul Helesden** – Head of New Business, Stroke Association

11.45

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**The OnSide model – challenging the premise that a major gift ask should never be made on a first meeting**

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Is there such a thing as making an ask too soon? What is stopping you making a five or six figure ask earlier? In this session you will gain the knowledge of 'The OnSide model' which has enabled OnSide to raise a staggering £100M in 10 years. We will show you how to apply the 'can do' approach and the tools you need to gain confidence to make a significant ask even sometimes at the first meeting! In our fast-moving times of social, cultural and political change, the luxury of waiting 18 months before making the ask is often no longer an option for organisations that want to grow, innovate and make an impact. At OnSide, we developed our own accelerated ask approach where fundraising is an organisational priority from the top down.

**Zahra Naqvi** – Talent Academy Manager, OnSide

**Francine Healey** – Head of Private Sector Development, OnSide

**Jane Hogarth** – Solid Management

**Alison Benjamin** – Director of Fundraising, OnSide

**15.00**

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**Fundraising from the Next Generation -  
The Future of Philanthropy**

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In this session we will explore the trends of the growing millennial population base here in the UK, and what this means in terms of opportunities and strategies for fundraisers. We will explore how technology is revolutionising how people digest information, what they want to see from organisations, and how they are called to action by some of the world's most pressing issues. From the SDGs to new entrepreneurial perspectives, we will speak to millennials about the solutions they're creating to help fundraisers access funding, resources and support from this generation.

**Morgan Kainth** - Director & Strategic Consultant, SML Solutions

**16.30**

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**The next generation of philanthropists**

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Details to be confirmed

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# The Bigger Picture

**10.30**

Session to be confirmed

**12.00**

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**Developing your people strategy**

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As a fundraising leader, your role is to identify and nurture talent in your teams. Why? Recruitment is increasingly competitive. Turnover is a challenge for many charities. Losing your best people has an impact on relationships with core supporters and on income generation. Fundraising leaders need to take a strategic approach to talent management. This session will help you to do this. Sharing tried and tested approaches, drawn from experienced practitioners, you will have the opportunity to review how you are engaging your talented individuals, from recruitment onwards and leave with tactics that you can immediately apply to talent development and succession planning in your teams.

**Loretta Bresciani Murray** - Consultant, THINK Consulting Solutions

**Jo McGuinness** - Head of Regional Fundraising South, Stroke Association

**14.15**

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**Are you the leader you intend to be?**

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This session will create the space for senior leaders to explore and understand the intentional leadership they can offer their organisation and the charity sector.

It will engage with senior leaders to:

- explore the strengths and challenges of sector leadership & leadership behaviours that are currently available
- gain a greater understanding of the steps they can take to align their personal leadership and organisational leadership
- begin a journey of identifying the kind of leader they can be to enable them to act fully in these spheres and align their personal leadership with their purpose in the world

**Catherine Andrews** - Freelance Consultant

**Terri McBride** - Leadership Consultant

**John Hitchin** - Chief Executive, Renaisi

15.15

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**Love your team like you love your supporters  
- because brand and culture are two sides  
of the same coin**

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We often talk about the supporter journey in fundraising, but this session focuses on how as leaders we can put more time and effort into our team's journey – from their first point of contact with us through to their day to day experience of being part of the organisation. This session will cover practical ways in which both leaders and members of the team can impact positively on their culture. It will include time to reflect on their own experience of culture and where they can most immediately make an impact in their own organisations

**Sarah Carter** – Culture Coach and Consultant

16.30

Session to be confirmed

**9.15**

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**How do we retain talent?**

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Details to be confirmed

**10.45**

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**The dream £1m - how to win People's Postcode Lottery's Dream Fund**

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Dream Fund is worth £1m to up to 3 charities annually, yet charities find it very difficult to know how to win. This session would explore why charities find it so difficult to win and what do you have to do - and not do - to win. It will explore this unique funding opportunity, blowing away some myths and giving you tips on how your dream project could win £1m.

**Malcolm Tyndall** - Director of Fundraising and Strategic Innovation, Whizz-Kidz

**Ross Miller** - Director of Fundraising, Missing People

**11.45**

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**How to rock being solo**

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Being the only fundraiser in an organisation is tough! You have to know about everything and often manage up, or across and have no other professionals in your field to bounce ideas off, or even challenge you! As a sole-fundraiser for a number of years, here are my Top 10 Tips to raise more funds, make you a better fundraiser and keep you sane in a busy, fast moving role.

You'll also meet everyone else at Convention who is representing alone!

**Gemma Rooke** - Development Manager, Z-Arts

15.00

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**Business as usual – 2029**

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Details to be confirmed

**Michelle Chambers** – Managing Director,  
THINK Consulting solutions

**Frances Milner** – Executive Director of  
Philanthropy and Partnerships, Cancer  
Research UK

16.30

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**A new brand promise – fit for purpose?**

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One year on, discussing the learnings of launching a new brand with high value stakeholders. The BHF launched a new brand promise in July 2018 with a focus on growing income. Our brand promise, ‘Beat Heartbreak Forever’ has been designed to create a more emotional connection to the BHF and our cause, seeking to broaden our appeal. But one year on, how has this translated to corporate and philanthropic audiences and what are our key learnings?

This session will discuss our new brand from a fundraising perspective and share an honest look at how we have taken our supporters and new audiences on a strategic journey to deepen their understanding and support of the BHF.

**HumahAkram** – Head of New Business, British Heart Foundation

**Victoria Kubie** – Head of Brand and Planning,  
Marketing and Engagement, British Heart  
Foundation

9.15

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**Culture of fundraising – a CEO’s perspective**

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Details to be confirmed

**Polly Neate**

10.45

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**Fundraising – It’s a funny old game**

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Join us as fundraising meets football in this ‘Match of the Day’ TRACKd session. Our panel of pundits will provide the match-day analysis as we put real-life fundraising campaigns head-to-head against each other. We’ll compare tactics to see why some campaigns smash their goals and why others end up wide of the mark. We’ll pick out the moments of skill that separate the great from the good. And we’ll bring you the reaction from supporters at full time.

Expect football puns and clichés galore as we highlight ways to make your campaigns less Messi and make your organisations more Ronal-dough.

**David Burgess** – Director, Apollo Fundraising

**Richard Sved** – Director, 3rd Sector Mission Control

**Lizzi Hollis** – Corporate Partnerships Manager, St Mungo’s

11.45

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**It’s time to TAKE OVAR – how collaborating on an integrated campaign can deliver huge results**

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Find out how Target Ovarian Cancer created the biggest ever campaign in the UK to raise both funds and awareness of ovarian cancer. It’s time to TAKE OVAR is a three year integrated campaign designed to work across the charity. It delivered a significant increase in our overall brand profile which in turn has led to increased fundraising across all income streams. Learn more about the highs and lows of defining audiences, refining messaging and measuring progress. We will share the story of how we connected with our stakeholders internally and externally and the impact and transformation we have had.

**Susan Booth** – Director of Development, Target Ovarian Cancer

**Alexandra Holden** – Director of Communications, Target Ovarian Cancer



15.00

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**Uncomfortable truths**

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Here is the uncomfortable truth. From Nike to Audi, Accenture to Lloyds Bank, commercial brands are tapping into a values system synonymous with the Third Sector: social impact, inclusion and sustainability. Unlocking the human, financial and social potential represented by diverse communities goes beyond being a compelling business case. The Third Sector must wake up to the threats and missed opportunities created by this cultural shift. If change and action are not immediate in the charity sector we risk lagging behind (yet again).

**Lannah Carbonilla** - Head of Supporter Engagement, The Institute of Cancer Research

**Rani Pooran** - Senior Advisor, Diversity & Inclusion Strategies Bank of Montreal Financial Group (BMOFG)

16.30

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**I wish I hadn't done that**

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Details to be confirmed

**Alix Wooding** - Director of Development, Southbank Centre

# Trusts and Statutory

9.15

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**Life on the other side of the fence - reviewing trust applications**

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This interactive session will provide an opportunity for trust fundraisers to receive honest feedback on their proposals from their peers. Delegates will take on the role of grant manager, tasked with assessing genuine proposals. They will be led through a series of exercises designed to test how easy the proposal is to read, understand and fund.

All delegates will gain a better understanding of what works from the perspective of a grant manager, and how they can make their own proposals easier for grant managers to fund. With expert input from Laura Solomons, Trustee of the Peter Minet Trust giving insight and expertise on what trustees really want.

**David Burgess** - Director, Apollo Fundraising

**Laura Solomons** - Trustee, Peter Minet Trust

10.45

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**Impact measurement**

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This session will cover impact data - what's out there, what's useful, what's not useful and how to transform your fundraising with impact measurement.

**Alex Blake** - Director, Keda Consulting

**Moira Lambert** - Head of Fundraising & Marketing, Orpheus Centre

**Karl Leatham** - Director, Kingston Smith LLP

11.45

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**Lights, camera, action - giving your trusts and foundations a movie makeover**

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Get ready for your close up.... The session will help you get your trusts and foundations in the best possible shape - from refreshing how you approach research and prepare proposals, to thank yous, stewardship, events, evaluation and reporting. It will also look at how you build a long term strategy for your team and your relationships and how to build an internal buy in and support and manage those relationships to ensure you get the information you need when you need it.

**Vicki Kelsall** - Head of Trusts and Foundations, BFI (British Film Institute)

**15.00**

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**Simple but effective – how to tell your complicated story to high value supporters**

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CLIC Sargent's fundraisers talked about what the charity did in inconsistent ways, funding restrictions were messy and it wasn't compelling. Sound familiar?

Hear how they cleared the decks and created the '6 Ways We Help' - Six clear and compelling propositions/cases for support that tell the story of the impact made to their service users. With resource packs for each 'way' high value conversations have become more simple and effective. They are also underpinned by a robust finance and evidence base. Crucially, it drove restricted fundraising and a brought a wider organisational shift by giving fundraising and services colleagues a common language.

**Angus Kerr** – Head of Strategy & Insight, CLIC Sargent

**16.30**

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**Changes at the Big Lottery Fund**

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The Big Lottery Fund is changing, and this is an opportunity for attendees to understand how and why. Gemma Bull, Director of Service Design of the BLF will share the Fund's priorities and aspirations as well as explaining how to access funding, and where to get application support locally. The Big Lottery Fund is the largest community funder in the UK. Last year, the BLF awarded over £500m of funding raised by National Lottery players. From small local projects to UK wider initiatives, BLF funding bringing people together to make a difference to their health, well-being and environment.

**Gemma Bull** – Director of Service Design, Big Lottery Fund

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