



actionplanning

CONSULTANTS TO THE NOT-FOR-PROFIT SECTOR

# New Income Sources

## for charities

A one-day conference on how to escape grant dependency by creating new and sustainable sources of earned income.

A key event for Chief Executives, Finance Directors and Fundraising Directors.

Attendance fee: **£125** per person including VAT, presentation materials and lunch

### Earned income and social enterprise



**Adele Blakebrough**  
Chief Executive, Community Action Network



**Andrew Robinson**  
Royal Bank of Scotland and Chair, UK Social Investment Forum.



**John Pepin**  
President, John Pepin & Associates

### futurebuilders



**Richard Gutch**  
Chief Executive, futurebuilders

### Venture capital and loan finance



**Malcolm Hayday**  
Chief Executive, Charity Bank



**Michele Giddens**  
Director, Bridges Community Development Fund

### Venture philanthropy



**Stephen Dawson**  
Chairman, Impetus Trust



**Lee Davis**  
Founder, NESsT, Chile

### Charity Commission perspective



**Geraldine Peacock**  
Charity Commissioner



**Rosie Chapman**  
Director of Policy, Charity Commission

Organised by  
Action Planning in  
Association with



ThirdSector





# New **sources** Income for charities

A one-day conference for Chief Executives, Finance Directors and Fundraising Directors on how to escape grant dependency through creating new and sustainable sources of earned income.

## Chair

**David Senior**



The conference will be chaired by David Senior, Marketing Director of Action Planning. A former charity Chief Executive, David held senior marketing roles in industry and the City before entering the voluntary sector. He now works with Action Planning's consultancy team to help charities develop innovative strategies and expand their funding base.

Registration and coffee

9 am

## SESSION 1 10 am to 11.20 am

### Income generation and social enterprise

Charity Commissioner, Geraldine Peacock, NCVO Sustainable Funding Project Leader, Nick Wilkie, and income generation consultant, John Pepin, will introduce ways in which charities can use their assets, reputations and expertise to generate new and potentially sustainable streams of earned income.

They will share a series of practical examples to encourage delegates. Two charity Chief Executives - Patrick Nash from the Teacher Support Network and Ben Hughes from bassac - will then explain how they succeeded in identifying and developing opportunities to generate earned income.

## SESSION 1

## SPEAKERS



**Geraldine Peacock**  
Charity Commissioner



**Nick Wilkie**  
Head of the NCVO Sustainable Funding Project



**John Pepin**  
President,  
John Pepin & Associates



**Patrick Nash**  
Chief Executive,  
Teachers Support Network



**Ben Hughes**  
Chief Executive,  
bassac

Income  
generation  
and social enterprise

## SESSION 2 11.30 am to 1.15 pm

### futurebuilders

This will be the first major opportunity to hear Richard Gutch in his new role as Chief Executive of futurebuilders. Richard will share his thoughts on how this £125 million fund should be used to benefit the voluntary sector and listen to your views.

### Venture capital and loan finance

Some income generating projects require nothing but flair and lateral thinking. Others require serious investment in people, training, equipment and marketing. Fortunately, an array of new financing opportunities are now available to the enterprising charity Chief Executive.

Malcolm Hayday, Chief Executive of Charity Bank, will guide us through a series of financing options. Michele Giddens, Director of the DTI-financed Bridges Community Development Fund, will explain the ways in which charities can create new businesses which attract equity investment.

### Legal problems. Legal solutions

This is new and unfamiliar territory to many charity leaders. How can you seize 'commercial' opportunities without upsetting the Charity Commission? Which legal structures are suited to your needs? What are the legal risks and pitfalls for the charity and for you personally? How can these be assessed and addressed?

Charity Commission Policy Director, Rosie Chapman, will use this event to provide guidance to the sector and Stephen Lloyd, Charity Partner at Bates, Wells & Braithwaite will set out practical solutions. A 'green light lawyer', Stephen is enthusiastic about income generation and believes that charities can proceed with confidence.

## SESSION 2

## SPEAKERS



**Richard Gutch**  
Chief Executive,  
futurebuilders

### futurebuilders

### Venture capital and loan finance



**Malcolm Hayday**  
Chief Executive,  
Charity Bank



**Michele Giddens**  
Director,  
Bridges Community  
Development Fund

## REGISTRATION FORM

Please fax this form to **020 8770 2090** or post it to the address below. You can also book by sending an email to **info@actionplanning.co.uk**

### Action Planning

Mid-Day Court, 30 Brighton Road  
Sutton, Surrey SM2 5BN  
Tel: 020 8642 4122

Please register the following delegates  
(BLOCK CAPITALS PLEASE)

1 Mr/Mrs/Miss/Dr: \_\_\_\_\_ First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

Mr/Mrs/Miss/Dr: \_\_\_\_\_ First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
E-mail: \_\_\_\_\_

2 Name of Charity/Organisation: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Postcode: \_\_\_\_\_  
Tel: \_\_\_\_\_

3 Please tick appropriate box:  
 I enclose my cheque for \_\_\_\_\_  
(made payable to Action Planning)  
  
*Attendance fee: £125 per person including VAT, presentation materials and lunch.*  
  
 Please register me/us and send me a VAT invoice.  
Unless you specify otherwise below, the invoice will be made out to your organisation.

4 Please indicate below if you have any specific dietary needs or require assistance in any other way: \_\_\_\_\_  
\_\_\_\_\_

5 If you would like a consultant from Action Planning to telephone you for an informal discussion about your needs, please tick this box:   
What would you like to discuss?  
 Fundraising  Strategy  
 Recruitment  Research

#### DATA PROTECTION

##### Action Planning communications

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

##### Third Sector

Third Sector would like to send you further information on their free subscription offer. Should you not wish to receive such communications, please tick here.

#### CANCELLATION POLICY

Your fee is fully refundable provided your cancellation is confirmed in writing by 29th March, though substitutions can be made at any time. Should we need to cancel the event for any reason, Action Planning's liability will be limited to the return of your fee.

#### PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.

# New Income Sources for Charities

A full-day conference at  
**CENTRAL HALL WESTMINSTER**  
for Chief Executives, Finance Directors  
and Fundraising Directors.

Central Hall Westminster  
Storey's Gate  
London SW1H 9NH

Thursday 1st April  
10 am - 4.30 pm

Attendance fee: **£125** per person including VAT,  
presentation materials and lunch

### What is 'New Income Sources for Charities'?

This is a full-day national conference for charity leaders on the hottest topic in the voluntary sector; how to escape grant dependency by creating new and sustainable sources of earned income.

The event brings together many of the leading practitioners in this field. They will speak on social enterprise, generating income from trading goods and services, the creation of new businesses, venture capital and venture philanthropy. We also have an address from the newly appointed Chief Executive of *futurebuilders*.

Case studies will help bring these subjects to life. We will also examine some of the technical, legal and governance issues which you will need to consider. A range of viewpoints will be represented and we anticipate much informative debate.

### Who should attend?

The conference should be of particular value to Chief Executives, Finance Directors, Fundraising Directors and Trustees, but all are welcome.

### How does Action Planning help charities?

Action Planning is a leading strategy, fundraising, research and recruitment consultancy serving the voluntary sector.

Each year we help around 100 voluntary sector organisations to raise funds, recruit key people and plan ahead. Our clients are assisted by a staff team of Senior Consultants, who are supported by in-house executive recruitment and fundraising research units. You can read more at [www.actionplanning.co.uk](http://www.actionplanning.co.uk).

If you would like one of our team of consultants to telephone you to discuss any of the issues facing your organisation and the ways in which we may be able to help, please complete section 5 on the form.

Alternatively, you can ring David Senior on **020 8642 4122** or email him at [dsenior@actionplanning.co.uk](mailto:dsenior@actionplanning.co.uk).



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CONSULTANTS TO THE NOT-FOR-PROFIT SECTOR



CENTRAL HALL WESTMINSTER – THURSDAY, 1ST APRIL 10AM TO 4.30PM

## SESSION 2

## SPEAKERS



**Rosie Chapman**  
Director of Policy,  
Charity  
Commission



**Stephen Lloyd**  
Charity Partner,  
Bates, Wells &  
Braithwaite

Legal problems. Legal solutions

**LUNCH** 1.15 pm

## SESSION 3

2.15 pm – 3.15 pm

### Developing an enterprise culture

Your know-how, people, services, fixed assets and 'brand' have real value. But how, in practical terms, do you recognise these opportunities and develop 'commercial' ventures? How do you get your people to think like entrepreneurs?

John Pepin specialises in helping charities to make this transition and will explain how your organisation can develop an enterprise culture. He will be followed by Adele Blakebrough, Chief Executive of Community Action Network (CAN), the UK's leading organisation for social entrepreneurs and a sponsor of this event. Adele will use a wealth of practical examples to inspire us to think anew about the opportunities in our own organisations.

David Varney, Chairman of O2 plc and Business in the Community, will then join Adele and John to respond to your questions and give a perspective from the business world.

#### Is it for us?

Income generation is now at the top of the voluntary sector agenda. Funders, Government and commentators are all urging charities to 'earn' sustainable income, but there are some differences of view as to how this is to be achieved.

Andrew Robinson, Head of Community Business Development for Nat West and the Royal Bank of Scotland, will set out a radical vision of the 'market led' charity. ACEVO Chief Executive, Stephen Bubb, and NCVO Head of Governance, Tesse Akpeki, will then debate with our other contributors in a panel discussion.

## SESSION 3

## SPEAKERS



**Adele Blakebrough**  
Chief Executive,  
Community Action  
Network



**David Varney**  
Chairman of O2 plc  
and Business in the  
Community

Developing an enterprise culture



**Andrew Robinson**  
Royal Bank of  
Scotland and Chair,  
UK Social  
Investment Forum



**Stephen Bubb**  
Chief Executive,  
ACEVO



**Tesse Akpeki**  
Head of  
Governance,  
NCVO

## SESSION 4

3.30 pm to 4.30 pm

### Venture philanthropy

John Pepin has helped charities in North America and Europe to build partnerships with venture philanthropy funds, which commit both donated funds and strategic assistance. He will explain the various forms of venture philanthropy and the ways in which you can benefit.

John will be followed by Stephen Dawson, Chairman of Impetus Trust, the first general venture philanthropy charitable trust in the UK, and Lee Davis, Founder of NESsT. Based in Chile, NESsT (Nonprofit Enterprise and Self-sustainability Team) works globally to promote financial sustainability for the not-for-profit sector. Lee is an acknowledged international authority on income generation and this is a rare opportunity to hear him speak in the UK.

## SESSION 4

## SPEAKERS



**Stephen Dawson**  
Chairman,  
Impetus Trust



**Lee Davis**  
Founder  
NESsT, Chile

Venture philanthropy