



CHARITIES FIT FOR THE FUTURE

10 May 2023

One America Square, London

Topics include:

- Leveraging charity finance to advance net zero
- Developing inclusivity and equity in a hostile financial environment
- Three untold stories of ESG investing
- Assessing and addressing your supply chain risk
- What does the Butler-Sloss ruling mean for the future of responsible investment?
- Cold truths about our warming planet



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THE ESG IMPERATIVE



Tristan Blythe
editor,
Charity Finance

Now is the time to build sustainable organisations that are fit for the future

The challenges facing humanity are immense. As we navigate the ongoing impact of a global pandemic, an escalating climate emergency and an unprecedented cost-of-living crisis, our actions and influence as civil society organisations are more important than ever. There is a growing awareness that organisations of all shapes and sizes have a personal accountability to consider their social and environmental footprint and to behave responsibly. But what does this really look like? How much of the reporting frameworks and strategies being adopted in other sectors are transferable to charities?



Jenni O'Donovan
Events director,
Civil Society Media

From navigating the complex world of responsible investment through to developing net zero targets and tackling social issues of equity and inclusion, there is a myriad of ethical decisions facing today's leaders. Our broad range of speakers will offer practical insight and advice, demonstrating the importance and urgency of the ESG agenda, and leaving you better-equipped to take meaningful action.

We hope you will join us for what promises to be an inspiring, practical and thought-leading conference.

Who should attend The ESG Imperative?



**Charity
leaders**



**Finance
teams**



**Chairs and
Trustees**



**Operations
teams**



**Sustainability
leads**



**Investment
directors**

Programme

08:45	Registration, refreshments, networking and time to visit exhibition	
09:25	Welcome from Tristan Blythe , editor, <i>Charity Finance</i>	
09:30	<p>Opening Keynote – Creating a culture of integrity</p> <p>Kate Sayer is the Director of Integrity & Ethics at Oxfam GB. She will talk about how ESG is being embedded in Oxfam’s ways of working. Oxfam is committed to combatting injustice and inequality as a source of poverty. As well as the campaigns and research, Oxfam seeks to align its ethical, environmental and social practices to its values of empowerment, inclusivity and accountability. Kate will share her learning journey and some practical examples.</p> <p>Kate Sayer, director of ethics and integrity, Oxfam GB</p>	
10:10	Transit time	
	<p>Stream A – ESG and Responsible Investment Chair: Ian Allsop, contributing editor, <i>Charity Finance</i> magazine</p>	<p>Stream B – Starting your ESG journey Chair: Tristan Blythe, editor, <i>Charity Finance</i> magazine</p>
10:15	<p>1A. Three untold stories of ESG investing</p> <p>The importance of assessing financially material environmental, social and governance (ESG) risks when analysing companies is well known. Yet comparatively little has been said about integrating these risks into portfolio construction. ESG considerations don’t have to detract from long-term returns, so it’s crucial ESG investors understand that they’re not immune to other portfolio risks simply because they want to go further when it comes to responsible investing. The long-term cost of any extra fees is also crucial to consider. This session poses some important questions designed to ensure that an ‘ESG investor’ understands the broader implications of their investment decisions.</p> <p>Andrzej Pioch, fund manager Legal and General Investment Management</p>	<p>1B. People and Culture: Developing inclusivity and equity in a hostile financial environment</p> <p>The pressure is mounting on organisations to prioritise their people or suffer the consequences of poor performance and low staff retention. But in an economic crisis, where demand for charity’s services is rising at the same time as income is falling, how can they keep up with employees’ expectations for increased financial remuneration and other benefits? Where pay cannot compete with other sectors, developing an organisational culture where everyone feels valued and supported is more important than ever. Our speakers also consider how these issues feed into diversity and inclusion, and how the makeup of the organisation from board level to volunteers, can impact ESG performance.</p> <p>Chair – Emily Ford, policy advisor, Chartered Institute of Governance Speakers – Debra Allcock-Tyler, chief executive, Directory of Social Change and Tiger de Souza, executive director of people and culture, Samaritans</p>
10:55	Morning coffee, networking and time to visit exhibition	
11:20	<p>2A. ESG and the new era of economic uncertainty</p> <p>The session will consider how the new era of economic uncertainty might change the emphasis within ESG investing for charities. The war in Ukraine has disrupted global supply chains for energy, which has changed the conversation on climate change. While COP26 and COP27 bought the race to net-zero to the top of the agenda for investors, many charity trustees are seeking to maximise investment returns in a way that is responsible and meets their charitable goals. But how can you navigate the current problems while remaining responsible?</p> <p>Nicola Toyer, head of charities, Investec</p>	<p>2B. Leveraging the power of charity finance to advance net zero</p> <p>The single biggest challenge facing us as a species is to deal with the damage that we have done to the planet we inhabit. But net zero targets can seem daunting and out of reach, or even beyond the FD’s remit. In an impassioned call to action, Simon Hopkins argues that we need to recognise the collective leverage that we have as a sector, with the total level of economic activity currently estimated at approximately £200bn a year. From leveraging shareholder activism to developing good supply chain partnerships, Simon outlines how by making incremental changes and harnessing our collective agency we could make a significant and important contribution towards achieving net zero.</p> <p>Simon Hopkins, director of finance and corporate resources, Versus Arthritis</p>
12:00	Transit time	
12:05	<p>3A. Our rivers are in trouble – what can we all do, including as charity investors, to make a real difference?</p> <p>Sadly just 14% of English rivers meet ‘Good Ecological Status’, a figure that has not changed since 2009. Investment managers have a role to play in engaging with water and wastewater companies on behalf of charity investors, to push for better practice across the sector. Join Neville and Carlota for an enlightening session on an area often neglected by other investors, and hear how EdenTree have engaged with UK & Welsh water utility companies to improve the health of our rivers.</p> <p>Carlota Esguevillas, senior responsible investment analyst and Neville White, head of responsible investment policy & research, EdenTree</p>	<p>3B. ESG Reporting: Moving from intention to action</p> <p>There is an increasing expectation that charities are being governed and operating in line with relevant environmental, social and governance criteria. Transparency and accountability is more crucial than ever when it comes to gaining trust and support from key stakeholders, including your funders, beneficiaries, supporters and even your own workforce. This session will consider how reporting underpins all aspects of ESG and is crucial in order to demonstrate real commitment and track progress, and offer some practical advice on how to get started, looking at some established reporting frameworks for guidance.</p> <p>haysmacintyre</p>
12:45	Lunch, networking and time to visit exhibition	
13:45	<p>4A. The Journey to Net Zero: Accessing strong returns with positive impact</p> <p>In this session, Cazenove Capital will be sharing the results of their recent charity sector research, which examines how charities are approaching Net Zero with their investments. They will provide case studies and suggestions of how to align your organisation’s portfolio with Net Zero and other climate commitments, whilst demonstrating progress to your stakeholders through impact reporting.</p> <p>Emily Petersen, portfolio director and Kate Rogers, head of sustainability, Cazenove Capital</p>	<p>4B. Starting from scratch: A practical guide to starting your net zero journey</p> <p>Research conducted by CFG in 2021 showed that 80% of charities do not have a net zero objective, and even fewer report on their carbon emissions. However, there are myriad benefits for organisations who are prepared to prioritise climate action; from saving time and money to strengthening trust and transparency with donors, funders and beneficiaries. Heart of the City is a charity which offers practical support and guidance to SMEs on becoming responsible businesses and mapping out net zero pathways. In this session they will talk about the growing importance of net zero for all organisations and the benefits of taking even small steps forward, translating their approach for charities. Join for practical tips on how to get started, signposting to free resources and support, and leave informed and energised to begin measuring your carbon footprint and create an actionable decarbonisation plan.</p> <p>Maggie Berry, director and Natalie Tickle, head of programmes, Heart of the City</p>
14:25	Transit time	
14:30	<p>5A. What does the Butler-Sloss ruling mean for the future of responsible investment?</p> <p>The recent Butler-Sloss judgement confirms that trustees have wide discretion to exclude investments based on non-financial considerations. However, to what extent does this mark a definitive moment in a shift towards responsible investment policies? Does it change trustees’ legal duties, or is it simply a confirmation of existing trustee discretion? In the meantime, the ESG investor’s dilemma over engagement versus divestment continues. We ask our panel what matters most to them.</p> <p>Chair – Lisa Stonestreet, head of communications and charity impact, Eiris Foundation Panel – Karen Atkinson, charities finance director, Bridge House Estates and Oliver Hunt, senior associate, Bates Wells</p>	<p>5B. Communicating is key – how to shout louder about ESG and why it matters</p> <p>Charities by their very definition are focused on creating public benefit, and will have plenty of existing activity that falls under good ESG practice. But with a lack of standardised guidance or reporting requirements, and when most are working to maximum capacity, how and why should we begin to prioritise ESG? This session draws on the example of medium-sized charity Groundwork Greater Manchester of looking at their existing work through the lens of ESG; measuring their carbon footprint, carrying out a gender pay gap review, adopting a sustainable procurement policy, and taking steps to embed a successful EDI culture. Deborah will argue that by adopting an ESG framework you can identify and celebrate all the great things you are already doing, and then work out the gaps and where you can do better.</p> <p>Deborah Murray, executive director, Groundwork Greater Manchester</p>
15:10	Afternoon coffee and networking	
15:35	<p>Cold truths about our warming planet – and the role of charity leaders in becoming part of the climate solution</p> <p>As United Nations Secretary-General António Guterres said at the recent UN Climate Change Conference of the Parties (COP26), “Our fragile planet is hanging by a thread. We are still knocking on the door of climate catastrophe. It is time to go into emergency mode — or our chance of reaching net-zero will itself be zero.” The outlook can seem bleak and we may feel powerless in the face of this stark reality. But the good news is that there is still a lot we can do to change this narrative. We invite sustainability and climate activist Chris Hines to inspire us to take our rightful place as part of the climate solution.</p> <p>Chris Hines, founding member, Surfers Against Sewage and former sustainability director, the Eden Project</p>	
16:15	Chair’s closing remarks	
16:25	Networking drinks reception	

QUICK REGISTRATION

	Super early-bird tickets (before 17 March)	Early-bird tickets (before 7 April)	Final release tickets (after 7 April)
Charity delegate	£99 (exc VAT)	£169 (exc VAT)	£249 (exc VAT)
Charity team ticket (up to four places) **Limited quantity available**	£249 (exc VAT)	£460 (exc VAT)	£649 (exc VAT)

Delegate name (inc title)	Position	Email	Your sessions (write letter A-B) in box provided
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