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TRUSTEE EXCHANGE

EXPLODING THE BOUNDARIES: CHANGING CHARITIES FOR A CHANGING WORLD

29.04.2025

BMA House, London

- Charity Commission update • Fundraising regulation
- Trustee remuneration • Anti-racism • Financial sustainability
- The board's role in strategy • Project management
- Organisational culture • Cyber governance • Diversifying income
- Four-day working week • Managing risk • The 3D reset & AI

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WELCOME



Welcome to Trustee Exchange 2025 – the 17th edition of this friendly event, which aims to share ideas and spread good practice, and provide a comfortable forum for trustees and other charity leaders to network, ask questions, and share challenges with a view to improving the effectiveness of their charity and its governance.

This year's theme is 'Exploding the boundaries: Changing charities for a changing world'. This is based on the premise that the unprecedented challenges we are facing as a society calls for a whole new paradigm; that maybe the charity sector can't keep doing what's it's always done if it wants to have real impact, and that we should explore new models of governance, new ways of operating, and new approaches to risk.

To that end, the programme covers a host of different topics, from project management to risk management (yes, we really will suggest that you throw out that risk register); and from cyber governance (do you really know if your charity's data is safe?) to income diversification – and a whole lot more in between. As always, sessions are 45 minutes long and a mix of case studies, expert advice, TedX-style talks and panel discussions – something for everyone.

We'll also feature updates from the Charity Commission and Fundraising Regulator, and we bookend the day with two not-to-be-missed keynote speeches, including one on how to be an anti-racist charity – one of the hottest topics in the sector right now.

Trustee Exchange is usually a sell-out, so don't delay in booking your place. In fact, why not bring a friend or three? Our team tickets are excellent value, and it really is a great day out. We can't wait to see you there.

Tania Mason, editor, Governance & Leadership

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09:00	Registration, coffee & networking		
09:20	Chair's welcome – Jenni O'Donovan , events director, Civil Society Media		
09:30	Opening keynote – Reasons to be cheerful: Expanding the boundaries of public benefit and showing solidarity Individual charities may be feeling under the cosh, but this present period of discontent masks a long-term trend of positive development in our sector. From what is considered charitable to who is allowed a seat at the table, the direction of travel is inherently progressive and emphasises the essential nature of charitable endeavour. In this inspiring opening keynote, veteran activist and advocate Helen Moulinos will chart the evolution of public benefit and the regulatory framework that polices it, explain why this should embolden those speaking truth to power, and outline the importance of taking action to amplify the voices of other organisations with less agency than yours. Helen Moulinos , trustee, Global Legal Action Network and former vice-chair, Amnesty International UK		
09:55	Plenary panel discussion – Paying trustees: Time to reopen this can? At this very conference last year, the audience was asked whether they favoured making it easier for charities to pay charity trustees for being trustees. A significant number raised their hands, many more than ever had before when this issue was on the agenda. So, we thought it could be time to reopen this long-running debate, and see whether sentiment is indeed shifting towards a more permissive approach to trustee remuneration, and what difference it could make to governance effectiveness and charitable impact. Tanya Barron , chair, Affinity Trust and trustee, Educational Development Trust; Mita Desai , co-CEO, Young Trustees Movement and chair, Community Action Redbridge; Paul Latham , director of communications and policy, Charity Commission; Baroness Jill Pitkeathley , former chair of the Lords select committee on charities; Brian Walsh , chair, Alternative Futures Group; Penny Wilson , charity consultant and former CEO, Getting on Board (chair)		
10:55	Morning networking break		
	Stream A – Finance & Investment Chair: Tristan Blythe , editor, Charity Finance	Stream B – Governance & Strategy Chair: Léa Legraien , senior reporter, Charity Finance	Stream C – Compliance & Risk Chair: Jenni O'Donovan , events director, Civil Society Media
11:25	1A. Fathoming the finances to maximise charity impact As the winds of change grow ever stronger, it has never been more important for trustees to hold their nerve and stay focused on strategic decision-making. This session will explore how trustees can ask the right questions of leadership teams to optimise financial sustainability and examine all options for maximising impact. Delegates will learn how to understand and minimise costs from a trustee perspective; hear why they must not overlook the impact of fundraising on long-term sustainability; and find out how to play with financial modelling to examine different options for their charity's business model. Steve Harper , social purpose partner, HaysMac	1B. The value of project delivery for strategy execution Project management plays a growing role in the success of non-profit organisations, helping them to maximise their impact and achieve their missions. But they operate under distinct conditions compared to their for-profit counterparts – resource constraints, wide stakeholder diversity, the frequent involvement of volunteers, and the need to align project outcomes with the broader mission of the organisation. In this session, Adam will explore the unique aspects of project management in charities, highlighting best practices, challenges and strategies for effective project delivery. Adam Boddison , chief executive, Association for Project Management	1C. Developments in Charity Commission regulation and other legal changes Join this session to hear Shivaji and Charlotte reflect on key developments in charity law and regulation and how charity trustees should respond to them. With reference to Commission guidance, inquiry reports and recent legal cases, they will explore the Charity Commission's developing approach to regulation, considering longstanding issues, newer areas of concern and the practical steps trustees can take to respond to them. Shivaji Shiva , partner and Charlotte Nutt , associate, VVV
12:10	Transit time		
12:15	2A. Judith Miller, Sayer Vincent	2B. Strategy and the role of the board Charities' approach to strategy is changing as we all navigate a rapidly changing world. Join this session to hear strategy and governance consultants from Bayes Business School, who specialising in the non-profit sector, share their ideas for ways to leverage the power of co-production and agility to ensure that strategy truly drives the organisation, including the work of the board. Angela Style and Nick Wilkie , consultants, the Centre for Charity Effectiveness, Bayes Business School (formerly Cass)	2C. Shining light on dark arts: Cyber governance in charities How confident are you that your charity is well protected against cyber risks? Many trustees lack the confidence even to ask questions about cybersecurity, thanks to the technical nature of such topics. But lack of rigorous oversight can leave charities vulnerable to serious risks such as insider threats, exploitation by technology suppliers, data protection breaches, financial fraud and safeguarding failures. Join this session to learn how to promote open discussion about cyber governance on your board, what questions trustees should be asking to understand cybersecurity risks, and how to take a whole-organisation approach to minimising these risks. Jessica Figueras , founder, CxB (Cyber Governance for Boards) and chair, the UK Cyber Security Council
13:00	Lunch break		

14:00	Charity Commission update In his first speech to Trustee Exchange, David Holdsworth, chief executive of the Charity Commission, will reflect on his first nine months in office, and set out what the sector can expect from the Commission in the years ahead. David Holdsworth , chief executive, Charity Commission		
14:20	Transit time		
14:25	3A. Decarbonisation, demographics and deglobalisation: The 3D reset & AI The global economy is in a phase of considerable transformation. As we navigate through these significant shifts, three key trends – deglobalisation, decarbonisation, and demographics, collectively referred to as the 3D reset – are shaping the global economy and influencing long-term investment opportunities. AI plays a significant role in the 3D reset – it is a critical enabler and catalyst for each of these forces, facilitating innovation, efficiency, and sustainability in various sectors. This session will explore what the 3D reset entails, its implications for investment, and how AI is a transformative technology that underpins these trends. Speakers from Cazenove Charities	3B. The role of the board in creating organisational culture Organisational culture drives organisational performance, and must be rooted in the charity's values and led from the very top. But how do you achieve a culture where everyone feels valued and included, and motivated to do their best work, especially when many of the team are working remotely? In this session, Tiger shares his experience of instilling a positive culture of belonging within charities, including the specific role of the trustee board. Tiger de Souza , executive director of people and culture, Samaritans	3C. Fundraising compliance from a board perspective Join the Fundraising Regulator for an essential overview of the new Code of Fundraising Practice and the key fundraising responsibilities of trustees, along with an insight into its complaints and investigations process. Conor Gibson , policy manager, Nikki Renken , head of casework and Gerald Oppenheim , chief executive, the Fundraising Regulator
15:10	Refreshments & networking break		
15:35	4A. Diversifying and growing income: A TLC case study As sector funding is squeezed ever tighter and competition for finite resources bites harder, many charities are desperate for new revenue streams and fundraising innovations. TLC is one charity that has met this challenge head-on, and successfully grown its income from less than £1m to £5m in seven years, through a combination of public sector commissioning, investing in fundraising, three tranches of social investment, and the launch of a "profit with purpose" trading subsidiary. Join this session to hear the charity's journey from precarity to sustainability, how it arrived at and weighed up different options, and its ambitious plans for even greater growth. Michelle Hill , chief executive, Talk, Listen, Change	4B. Moving to a four-day working week Both Friends of the Earth and Brook have taken the plunge and implemented a four-day working week for their staff – with no loss of pay. Join this session to hear about their journeys, the challenges they overcame, the benefits reaped so far, and to ask any questions you may have about making such a move at your charity. Adrian Cruden , head of people, Friends of the Earth; Helen Marshall , chief executive, Brook; Joe Ryle , campaign director, the 4 Day Week Campaign (chair)	4C. A conversation: Is the sector's approach to risk holding us back? There is a view in the sector that as charities have become subject to ever more law and regulation, boards have become more compliance-aware and risk-averse – to the extent that this is acting as a brake on achievement of impact and inhibiting real change. Is this true, and if so, what can be done about it? Join this session for a lively conversation with two sector leaders who have been thinking about this topic a lot, and working on new approaches that aim to grease the wheels of progress. Caron Bradshaw , chief executive, Charity Finance Group; Ed Mayo , chief executive, Pilotlight
16:20	Transit time		
16:25	Closing keynote: How to be an anti-racist charity Equity, diversity and inclusion is now on the radar of most charity boards, but many are now realising that real change – for both the organisation and its beneficiaries – can only be infused and sustained if these strategies are underpinned by an organisation-wide drive to be actively anti-racist. In this thoughtful and provocative closing keynote, Frances will spell out the role of trustee boards in driving forward the anti-racism agenda within their charities, highlighting some of the obvious and more subtle barriers that stand in the way of change, and suggesting some practical tips for moving forward – including helping delegates to reflect on whether their own narrative or behaviours could be stifling progress. Frances Brown , governance, EDI and strategy specialist		
16:50	Chair's closing remarks		
16:55	Networking drinks reception		

The must-attend event for charity CEOs, chairs and trustees



What did the 2024 delegates say?

“Thought-provoking speakers, well curated breakout sessions and panel discussions, and excellent networking opportunities. Overall, a fantastic event.”

Marie Livingstone, RHASS

“Thrilled I decided to attend this year and aiming to make it a yearly part of my continuous development and learning for my board position(s).”

Sheldon Shillingford, Commonweal Housing Trustee

“Almost too good, hard to decide which breakouts to attend, nice problem to have!”

Juliet Frost, The Thoroughbred Breeders' Association

“I found the information accessed via plenaries, workshops, networking very enlightening. As were the opportunities to hear and learn from other charities outside of my direct sector but with the same underlying principles and values. There were fresh new takeaways particularly related to cross sector collaboration opportunities for charities.”

Lawayne Jefferson, co-chair, National Governance Association

“This conference gets better every year. Sessions this year were really useful, informative and it led to a really enjoyable day. Well, done Civil Society and all involved.”

Anonymous

“Well organised, with a good programme of events for trustees and other charity roles. Excellent networking opportunities and a very friendly event to attend.”

Louanna Winch, Family Fund

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Delegate name (inc title)	Position	Email	Your sessions (write letter A-C) in box provided							
1.			11:25	<input type="checkbox"/>	12:15	<input type="checkbox"/>	14:25	<input type="checkbox"/>	15:35	<input type="checkbox"/>
2.			11:25	<input type="checkbox"/>	12:15	<input type="checkbox"/>	14:25	<input type="checkbox"/>	15:35	<input type="checkbox"/>
3.			11:25	<input type="checkbox"/>	12:15	<input type="checkbox"/>	14:25	<input type="checkbox"/>	15:35	<input type="checkbox"/>
4.			11:25	<input type="checkbox"/>	12:15	<input type="checkbox"/>	14:25	<input type="checkbox"/>	15:35	<input type="checkbox"/>

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