

CO³
Chief Officers 3rd Sector

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Sustaining our Sector

Environment • Social • Governance

28 September 2023 • The La Mon Hotel • 8:30am - 4:30pm

Welcome to
**The CO3 Annual Leadership
Conference**

"SUSTAINING OUR SECTOR"



Environmental



Social



Governance



FOREWORD

A very warm welcome to the 2023 CO3 Annual Leadership Conference kindly supported by our key partner Evelyn Partners. As ever the conference provides us with a very special opportunity to come together, exchange ideas and enjoy networking with fellow leaders in the VCSE sector.

This year our Conference theme is Sustaining Our Sector – ESG – Environment, Social, Governance.

After the pandemic we saw a significant rise in demand for the services of charities which has been exacerbated by the cost-of-living crisis and many more of the people that we serve are experiencing hardship and disadvantage.

The increase in demand has placed the VCSE sector under pressure to deliver more at a time when there are also difficulties in recruiting and retaining staff in the sector.

Funding uncertainty has made the situation more challenging as many of our members have been unable to provide certain staff with job security due to funding cuts or because the decisions around funding have been taken very late. In some cases, our members have had to put staff on protected notice and make redundancies causing a loss of expertise and experience reducing the capacity of the sector overall.

Our Conference Workshops on “The art of Winning your Organisation’s Talent Challenge” and “What’s all the Fuss about? Integrating ESG” are designed to support you as you navigate these issues for your organisation.

Today we will focus on what we can do to Sustain Our Sector. ESG is fundamental to good governance and the effective running of organisations. We will hear about Leading Sustainably from Hakan Nordkvist the former head of Sustainability at furniture giant IKEA.

We will also hear how ESG is a core boardroom agenda item for ASDA and hear from Grainia Long Chief Executive on NIHE on their approach to Social Value.

Followed by the expert Panel Session on Social Value which will explore the opportunity for the VCSE sector to develop new sustainable incomes.

John Brothers will lead the conversation on Reimagining Governance ahead of a panel discussion and explore great Governance through the lens of ESG.

Our segment on Financial Wellbeing with Nadine Reynolds of Better with Money couldn’t be more timely as we as employers strive to support our staff through challenging financial times.

We are delighted this year to offer 1:1 Financial Clinic appointments to you with the leading sector experts on charity Investment, Accounting and Lending.

Finally, we will hear from the inspiring former International Rugby Player Ian McKinley who will share his experience of adversity and how he developed resilience.

This CO3 Annual Leadership Conference is supported by a number of our corporate partners, and we appreciate their generosity in helping us to deliver a great conference day.

Don’t forget to check out the exhibition stands during the breaks, and we wish you all a wonderful day.

Valerie McConville
Chief Executive - CO3



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WORDS FROM OUR SPONSOR

It is with great pleasure that all the team at Evelyn Partners welcome you all to the CO3 Leadership Conference 2023. As the main conference sponsor, we are truly honoured to be a part of this exceptional gathering of individuals who dedicate their lives to making Northern Ireland a better place.

The theme of this year's conference, ESG (Environmental, Social, and Governance), resonates deeply with our mission at Evelyn Partners. In a rapidly changing world, it has become increasingly vital for organisations to embrace sustainability, ethical practices, and social responsibility as core principles. We believe that the charity sector, with its unwavering commitment to serving society's most vulnerable, has a pivotal role to play in advancing the ESG agenda.

Our Guide to ESG is broadly detailed below and we would be delighted to discuss our initiatives further with you throughout today and into the future.

Effectively incorporating environmental, social and governance (ESG) issues into your charity's investment portfolio is a central component to achieving your investment goals.

A charity's investments should support the organisation's mission, rather than conflict with them. Evelyn Partners works with charities to understand their ESG objectives first, and then build a portfolio around these.

Finding the right balance between maximising the probability of achieving your target, your financial goal or ensuring your investments genuinely align with your values and purposes can be a challenge. Our approach allows each charity to reflect their unique characteristics.

This begins with our robust central investment process which uses quantitative and qualitative factors to create a foundation and structure that manages risk at every level. This provides our clients with the peace of mind that their portfolios are capturing long term trends, while managing short and medium term risks. Embedding ESG screening factors into this process ensures we are also protecting your charity from any additional reputational risks.

Furthermore, we prioritise good stewardship and engagement. We can report on a wide range of carbon emission metrics and ESG scoring for each charity portfolio. This also enables us to measure progress towards the United Nations Sustainable Development Goals (UN SDGs).

This conference is a unique opportunity for you to connect, learn, and collaborate with fellow leaders in the 3rd sector. It's a platform where ideas are born, partnerships are forged, and strategies are refined. We are excited to see the innovation and determination that will emerge from your discussions over the coming days, weeks, months and even years ahead.

Many Thanks,

Chris O'Neill

Partner, Investment Management

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Tel: +44 28 9072 3033

Mobile: 07920871292

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Your business and personal financial needs may seem complex and with direct access to our team of professional advisers you can get the specialist advice you need to grow your business and meet your financial challenges.

To find out more, please contact:

Chris O'Neill, Partner

Evelyn Partners Investment Management LLP

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E: chris.oneill@evelyn.com

www.evelyn.com

Evelyn Partners is the new name for Tilney Smith & Williamson.

Evelyn Partners Investment Management Services LLP is authorised and regulated by the Financial Conduct Authority. Services may be provided by other entities within the Evelyn Partners group of companies. The title 'Partner' does not mean that the individual is necessarily a partner of Evelyn Partners Investment Management LLP. For a full list of LLP partners, please refer to Companies House or request directly from us. Further details about the Group are available at evelyn.com.

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AGENDA

8:45 - 9:00

Registrations

9:00 - 9:25

Refreshment &
Networking at the
Exhibition Area

9:30 - 9:35

Welcome from Jacinta
Linden Vice-Chair, CO3

9:35 - 9:40

Welcome from Host,
John Conaghan

9:40 - 10:25

**ESG - A Sustainable
Future** - Keynote
Presentation by Hakan
Nordkvist

10:25 - 10:45

**What is ESG - One
Organisation's
Journey** Keynote
Presentation by Joe
McDonald

10:45 - 11:00

BREAK

11:10 - 11:30

**Reimagining
Governance** Keynote
Presentation by John
Brothers

11:30 - 12:15

**Panel Session:
Reimagining
Governance**

A vertical collage of images showing people at a conference. On the left, a man in a suit is visible. In the center, a woman in a black coat and white skirt is looking at a book. On the right, a group of people are gathered, some holding coffee cups. The collage is partially obscured by a dark blue rounded rectangle on the right side.

AGENDA

12:15 - 13:15

Morning Workshop &
Financial Clinics

13:15 - 13:45

LUNCH

13:50 - 14:35

Afternoon Workshop &
Financial Clinics

14:40 - 15:00

**Providing Financial
Wellbeing Support to
Your Teams** Keynote
Presentation by
Nadine Reynolds

15:00 - 15:20

**What Does Social
Value Mean for Our
Sector?** Keynote
Presentation by
Grainia Long

15:20 - 16:10

**Panel Session: What
Does Social Value
Mean for Our Sector?**

16:10 - 16:45

**Inspirational Keynote
Presentation** by Ian
McKinley

16:45 - 17:00

CLOSING

Meet your Host

This year's CO3 Annual Leadership Conference will be hosted by Leadership and Wellbeing Consultant, **John Conaghan**

After 13 years working with Inspire, one of the leading mental health charities in Ireland, John is now a successful Wellbeing & Leadership consultant, working across all sectors supporting organisations and individuals to grow and thrive within psychologically safe cultures. Prior to working with Inspire John worked in the pharmaceutical industry for 17 years in a variety of Healthcare Development and Sales Management roles. For his last six years with Inspire, John was the Group Director for Therapeutic & Wellbeing services, holding strategic responsibility for the delivery of mental health and wellbeing services to over 200 organisations. John has extensive experience in leading on several large programmes of mental health support in the workplace. John is a passionate supporter of the Community and Voluntary and Social Enterprise sectors and a leading expert on Social Value, Compassionate Leadership and Creating Psychologically Safe Cultures in the Workplace.



Gain New Perspectives from Exceptional **Keynote Speakers**



Hakan Nordkvist

Former Head of Sustainability innovation in IKEA Group

Known for his innovative solutions and has played an integral role in developing many of IKEA's sustainability services.

Setting bold futuristic goals and ambitions and then successfully implementing those goals through innovative initiatives, road maps and creative businesses and solutions for a better future.

Hakan will speak on leading sustainably and building sustainability in organisations without huge capital spend.

Joe McDonald

Head of Corporate Affairs, Asda NI

Joe represents Asda on all aspects of policy affecting the retailer in Northern Ireland including: planning, business rates, alcohol legislation and local supply chain. Joe's role also entails building relationships with stakeholders and promoting Asda's diverse range of Corporate Responsibility programmes. He is responsible for Asda's UK Public Affairs engagement with Defra and is the organisations UK policy lead on Brexit, and formerly on Covid.



Gain New Perspectives from Exceptional **Keynote Speakers**



John Brothers

President, T. Rowe Price Foundation

Under Dr. Brothers' leadership, T. Rowe Price has become widely recognized and honored as a social sector leader in several areas including Trust-Based social good, partnership, evaluation, governance and how companies build authentic relationships in local communities. Nearly 200 global brands have sought the advice of Dr. Brothers and the social good model he created at T. Rowe Price since early 2020.



Grainia Long

CEO of the NI Housing Executive

Prior to joining the Northern Ireland Housing Executive as chief executive in February 2021, Grainia was previously the Chief Executive of the National Child Protection Charity in the Republic of Ireland, ISPCC Childline. This position followed several years working in housing, including as Chief Executive of the Chartered Institute of Housing (CIH), and previously National Director of the CIH in Northern Ireland.

She has served two terms as a member of the Northern Ireland Human Rights Commission, was a member of the Lyons Commission on Housing Supply and Advisor to the Best Commission on the Future of Housing in Northern Ireland.



Gain New Perspectives from Exceptional **Keynote Speakers**



Nadine Reynolds

Financial Wellbeing Consultant at Better with Money

Better with Money was set up to reduce financial misery and confusion in the UK. They aim to bring money matters to life in an accessible and interesting way, helping their beneficiaries to think clearly about money and inspire action around their finances.

With 10 years in the banking industry and the last 3 years specialising in financial wellbeing, Nadine has been able to guide, support and educate many individuals on their financial journeys whether it be savings, investing, homebuying or money management to name but a few.

Ian McKinley

Coach, author and the first ever goggle wearing visually impaired international rugby player

Ian was a professional rugby player for nearly 10 years and has now entered the world of coaching. Since the arrival of the rugby goggles, Ian has been involved in multiple inclusive projects to do with sport with many different organisations. Ian is also a motivational speaker as his personal story not just a sporting story but a life one.



hello change-maker

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celebrating Northern Ireland's
change - makers.

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www.communityfinanceireland.com or [@ComFinanceIrl](https://twitter.com/ComFinanceIrl)

PANEL SESSION I

Reimagining Governance



SARAH BURROWS

PARTNER EDWARD
& CO SOLICITORS



TONY CLARKE

DIRECTOR AT
CLARKE & CO



KERRY ANTHONY

GROUP CHIEF
EXECUTIVE AT
INSPIRE WELLBEING



PHELIM SHARVIN

HEAD OF
COMMUNITY
FINANCE NI

Tony Clarke
& COMPANY

Providing a range of tailored
financial service to the 3rd Sector.

WHO WE ARE

Tony is a certified public accountant. He has in depth and detailed knowledge of the charitable sector including working with a range of funders and grant making bodies. Tony has a unique understanding of the wider sector and has a wealth of experience working with CEOs and Boards/trustees assisting with organisational budgets, preparing, and presenting management accounts and payroll workings. Tony also provides a finance training workshop and seminars.

PANEL SESSION II

What does **Social Value** mean for our sector?



JONATHAN MCALPIN

CEO AT EAST
BELFAST ENTERPRISE



LYNN CARVILL

CEO WOMEN'S TEC



DAVID FRY

DIRECTOR OF
EXTERNAL AFFAIRS
AT CONSTRUCTION
EMPLOYERS
FEDERATION



DAVID HUNTER

ESG CONSULTANT

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Attend Insightful **Workshops**

Workshop I

The Art of Winning your Organisation's Talent Challenge with Ryan Connor - Baker Tilly Mooney Moore

Do you fully understand the impact of your organisation's strategic goals on your talent needs?

On this workshop we will explore how to apply a strategic approach to talent management, highlighting best practice and identifying the stages that organisations, regardless of size and scale, must consider to ensure success.

We will consider how you can ensure that your organisation has the right talent in terms of people, knowledge, skills, behaviours for now and for the future to achieve your strategic objectives and deliver for all of your stakeholders.

Supporting Charities to Change and Grow

- Organisation Design
- Organisation Development
- Systems and Process Improvement
- Executive Coaching, Leadership and Development
- Governance Reviews & Board Transformation
- HR Advisory

Contact Donal Lavery, Consulting Partner

E: donallavery@bakertillymm.co.uk ▪ T: 028 9032 3466

Attend Insightful Workshops

Workshop II

What's All The Fuss About? Integrating ESG into your Risk Management Approach - A Perfect Marriage! with Eric Alter and Sarah Pearson - Marsh

How should your charity manage potential risk?

Third-sector organisations often rely on donations, grants, and other sources of funding. Effective risk management helps ensure that financial resources are used responsibly, reducing the likelihood of financial mismanagement and potential losses.

This session will set the scene – what's all the fuss about? ... and will go into more detail around the E, S & G. There will be discussions around what part of ESG is of most concern with the opportunity to share experiences and learning. We will look at how ESG can be integrated into your RM approach (using a pragmatic and proportionate approach) to help you manage ESG risks, maximise opportunities and support a conversation at a strategic level.



CO3 Awards 2024
nominations opening soon!

14th March 2024

BRAND NEW FINANCIAL CLINICS

A 15-minute One-to-One Meeting with a Financial Expert

The financial clinics are a great opportunity to confidentially meet with a financial expert and receive free-of-charge guidance on a specific question you might have related to your organisation's particular challenges.



Book a One-to-One meeting with Evelyn Partners for any help related to wealth management and how to secure and maximise investment.



Meet with Tony Clarke for guidance related to day-to-day management and optimisation of your organisation's financial accounts.



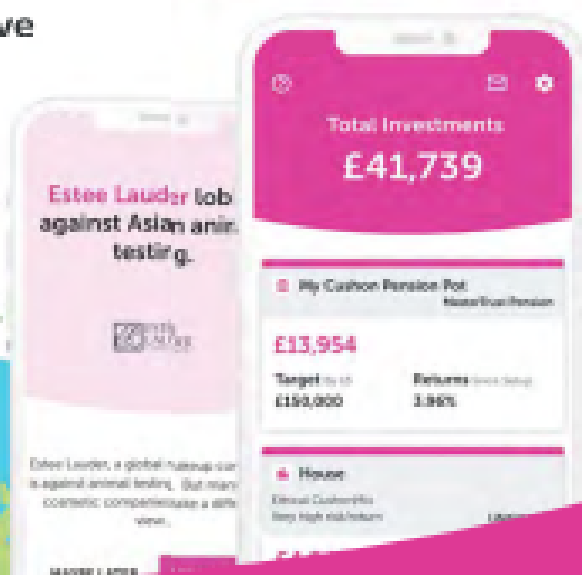
Book time with Community Finance Ireland for assistance on how to successfully draw down the loans your organisation needs.



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How to join CO3?

Are you a third sector chief officer, chairperson, trustee or senior manager?

Do you have an interest in the third sector?

Do you want to join a strategic network for you and your peers, which will help you to lead more effectively?

Would the company you work for like to connect with or help the not-for-profit sector as part of your Corporate Social Responsibility?

If your answer to any of these questions is 'yes' then join CO3 today!

A network of third sector leaders who inspire and support through building peer connections, skills development and advocacy. We have a rich heritage in leadership development spanning some of the largest charities and social enterprises through to medium and well-known third sector organisations.

CO3

Chief Officers 3rd Sector

JOIN HERE



UPCOMING TRAINING & NETWORKING EVENTS



The 6 Things Every Trustee Should Know/Do

Facilitated by Brendan Mullan

Thursday 12th October from 5:30 to 7:30pm

BOOK NOW



Interim Executive Training

Interim Executive Training prepares individuals to work with a third sector organisation on a short term basis, helping organisations to either manage a gap in permanent leadership and/or to provide additional support to a Chief Executive and the senior management team in times of need. **Thursday 19 & Friday 20 October 2023 - 9am - 5pm (2 full-days)**

BOOK NOW



CO³ AGM 2023

Tuesday, 24th October 2023, 2:30 - 4:00pm

BOOK NOW



UPCOMING TRAINING & NETWORKING EVENTS



Regional Charity Leaders Forum

This 3.5-hour training, facilitated by Alice Garrad, will teach you the 6 critical steps to succeed with Major Donor's fundraising so you can diversify your funding and make your organisation more sustainable. **Thursday 26 October 2023, 9:30am – 1pm**

BOOK NOW



Trustee Masterclasses

A group of workshops facilitated by Brendan Mullan and specially designed to support the development of Trustee members. You can either book a specific masterclass or get special value by booking to all of them.

Sessions:

Session 1: Effective Board Governance (1st November 6-8pm)

Session 2: Strategic Direction, Financial Oversight and Stakeholder Relations (15th November 6-8pm)

Session 3: The Oversight of Risk (29th November – 6-8pm)

Session 4: Board and Trustee Evaluation (13th December – 6-8pm)

BOOK NOW



UPCOMING TRAINING & NETWORKING EVENTS



New to Post CEO Forum supported by Quilter

Develop a peer network, share best practice, learn from experts and benefit from a supportive learning environment where you can share freely and build lasting relationships with like minded professionals.

Sessions:

Managing Your Board Facilitated by Roger Courtney - 7th September

Ethical Investing Facilitated by Quilter - 1st November

Crisis Management - January TBC

Media Training - March TBC

BOOK NOW



6 Critical Steps to Major Donor Fundraising

This 3.5-hour training, facilitated by Alice Garrad, will teach you the 6 critical steps to succeed with Major Donor's fundraising so you can diversify your funding and make your organisation more sustainable. **Thursday 26 October 2023, 9:30am – 1pm**

BOOK NOW



Our VISION

A fair and connected society with a vibrant, valued third sector, led by influential leaders, delivering outstanding impact.



Unity



**Social
Justice**



Integrity



Quality



Courage



**Empowering
Leadership**



CO3 Chief Officers 3rd Sector



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THANKS FOR ATTENDING!

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