



Mission & Money Aligned: Charities & Responsible Investment

2:00 – 2:15pm Arrival and Registration

2:15 – 2:25pm Welcome and Introduction

2:25 – 3:15pm ‘The Time is Now’

This panel discussion will introduce some of the big issues around the topic of charities and responsible investment and finance. Why is it such an important time for charities to be considering this subject? What can we learn from developments in the pension space? How might charities, large or small, take a leadership role on this?

Speakers: David Bent, Chair of the EIRIS Foundation Trustee Board (Chairing the discussion); Caroline Escott, Policy Lead, Pensions and Lifetime Savings Association; Luke Fletcher, Partner at Bates Wells Braithwaite; Danielle Walker-Palmer, Director of the Friends Provident Foundation

3:15 – 3:30pm Charities and Responsible Investment: The legal context

Speaker: Luke Fletcher, Partner at Bates Wells Braithwaite

3:30 – 4:25pm Breakout ‘ABC’ workshops:

These workshop sessions are intended to be completely interactive. Each group will have a discussion leader and a few topic experts in the room to help guide attendees and answer any questions. Attendees will be asked to self-select and choose the group that they feel is the best fit for them and their organisation. All the sessions will include some discussion around what other aspects of ‘good money’ an organisation can consider i.e. not only considering investment products or portfolios. Some of the discussion in each group will look at the EIRIS Foundation’s new Charity ‘RI’ Roadmap focussing on four key areas ‘Portfolio & Products; Pensions; People and; Partnerships’ that charities can consider.

GROUP	POTENTIAL DISCUSSION POINTS
A – Asking questions	<ul style="list-style-type: none">- How to get started- Where to go for help/useful resources- Learning from other organisations- Potential pitfalls & countering opposition
B – Building on first steps	<ul style="list-style-type: none">- Looking beyond a RI policy- Communicating your policy effectively- Reviewing and evaluating
C – Can we improve? Can we help others?	<ul style="list-style-type: none">- How are you evaluating success?- Are you using your influence?- Have you considered all aspects of ‘putting our money where our mouth is’?

4:25 – 4:45pm Refreshment and networking break

4:45 – 5:30pm Focus topics:

Responsible Investment in charity pooled funds – Lisa Stonestreet, EIRIS Foundation

Investment to save the climate - Tom Harrison, Sainsbury Family Charitable Trusts

Financing the Sustainable Development Goals – Speaker tbc

Engaging savers with pensions and responsible investment – Michael Kind, ShareAction

5:30pm Closing remarks followed by a drinks reception

6:30pm End