

The Charity Conference 2018

23rd November 2018

Radisson Blu Waterfront Hotel, Jersey



PAUL SAVERY, MANAGING DIRECTOR - CHANNEL ISLANDS, BARCLAYS INTERNATIONAL

Paul Savery has lived in Jersey since 2003 and heads up the Barclays' franchise across the Channel Islands. Paul has expertise in and responsibility for the fiduciary, fund, family office, and captive client segments within the Overseas Services business. He has market management responsibility for the Middle East region. Prior to moving to Jersey, Paul was Corporate Director for Barclays Bank of Botswana Limited and held senior roles in UK Corporate Banking and also in Egypt with Banque du Caire Barclays. He was UK finalist and Jersey winner of IoD Director of Year, Large Company in 2017. Paul is Deputy Chairman for Jersey Finance Limited, is an Associate of the Chartered Institute of Bankers and holds the Institute of Directors Diploma and Certificate in Company Direction. He also sits on the Board of the charity Mind Jersey.



SHARON PEACOCK, TECHNICAL DIRECTOR, LAW AT WORK (CHANNEL ISLANDS) LIMITED

Sharon Peacock specialises in employment and discrimination law in the Channel Islands, conducts advocacy in both the Jersey and Guernsey Tribunals and regularly delivers black letter law training. Sharon is a qualified solicitor (of the Supreme Court of England and Wales) and initially trained and worked with Eversheds law firm in Cambridge and Paris, before moving offshore when Jersey introduced its principal employment law in 2006 to work in Ogier, where she went on to head up its Employment Law Department as a Senior Associate. Sharon is now a non-practising solicitor and director of Law At Work.



TARA MANTON, PRIVACY CONSULTANT, CALLIGO

Tara Manton is a Privacy Consultant in Calligo's Privacy Services team. She is responsible for providing advice to clients on compliance with their legal obligations under European data protection legislation, in particular the GDPR. Before joining Calligo, Tara worked as a lawyer, most recently for local law firm, MJ Hudson and, prior to that, London based law firm Squire Patton Boggs. She is a qualified solicitor in England & Wales with 10 years Post Qualified Experience and a certified GDPR practitioner.



CHRISTOPHER SCHOLEFIELD, ADVOCATE, VIBERTS

Christopher leads Viberts' busy and expanding commercial department, advising on Jersey companies, trusts, foundations and partnerships. Clients typically want to know how to establish and operate them or how to complain when they are being run incorrectly. Christopher is experienced in estate and succession planning, commercial agreements, regulatory matters, insolvency and philanthropy. He is an experienced professional, well used to dealing with cross border matters, quick to establish a good rapport with clients and colleagues from other jurisdictions.



JOEL GRAVES CFA, INVESTMENT MANAGER

Joel is one Smith & Williamson's 170 investment managers who advise individuals, businesses and charities about the preservation and growth of their wealth or reserves, and the firm has over £20bn of assets under management. Joel is the Jersey representative of the specialist team supporting Charities with their investment requirements, and the firm is one of the largest providers to Charities in the UK and Ireland with over £2bn of charity assets under management. Joel is a holder of the Chartered Financial Analyst (CFA) designation and a member of the Chartered Institute for Securities & Investment (CISI), and teaches the highly regarded CFA qualification to Jersey students in his spare time.



MARIE VIBERT, ENGAGEMENT AND COMMUNICATIONS LEAD WITH REVENUE JERSEY

Marie Vibert has worked in marketing, communications and culture change engagement for over 20 years across several industries. She moved to the public sector in 2017 after 11 years working with Big 4 accounting firms. She is responsible for the Revenue Jersey people programme, for communications and engagement with all parts of the States of Jersey and with Jersey's business and wider community.

PAUL EASTWOOD, DEPUTY COMPTROLLER OF TAXES

Within Revenue Jersey Paul has a broad portfolio of responsibilities including tax policy development and managing the service's international tax operations. Paul is both a Chartered Accountant and a Chartered Tax Advisor, having qualified in the early 2000s.



FIONA VACHER, EXECUTIVE DIRECTOR, JERSEY CHILD CARE TRUST

Fiona is the Executive Director of the Jersey Child Care Trust, a medium sized local charity putting families first. The charity has fundraised and invested over £1.4 million over the last four years, into its programmes to enable all our children to have the best start. Fiona's professional qualifications are in early years and childcare, management and leadership. Her role with the charity however, has naturally needed her to develop her knowledge and skills in the area of fundraising with some superb results.



CATHY LE FEUVRE, BBC

Until very recently Cathy Le Feuvre could be heard on BBC Radio Jersey's Afternoon Show – she's been presenting and producing shows for BBC Jersey for a few years but originally started her media career in Jersey. Cathy worked first for the JEP Radio Jersey and Channel TV before moving to the UK where she worked for regional BBC television as a presenter/producer/reporter and eventually as an ITV network producer. She then worked in national PR, including years spent as the Head of Media for a large UK charity and subsequently as a communications consultant/trainer. Cathy is also a published author.

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Welcome

Jersey Community Partnership is delighted to welcome you all to the inaugural Charity Conference! The voluntary and community sector here on the island is a large, vibrant community consisting of more than 535 organisations, generating in excess of £80m annually and with around 11,000 islanders volunteering their time for good causes. We hope that today will provide you with the information, support and guidance to help you to make an even bigger difference to the communities you serve.

Keynote Speakers



HIS EXCELLENCY THE LIEUTENANT-GOVERNOR OF JERSEY, AIR CHIEF MARSHAL SIR STEPHEN DALTON GCB LLD(HON) DSC(HON) BSC FRAES CCM

Air Chief Marshal Sir Stephen Dalton joined the Royal Air Force in 1976 after graduating with an honours degree in Aeronautical Engineering from Bath University. During the height of the Cold War, he flew the Jaguar fighter/bomber on 3 tours. Subsequently, in his later career, Air Chief Marshal Dalton commanded the RAF's Jaguar Force for 2 years from September 1997. On promotion to Air Vice-Marshal, he took over the post of Capability Manager for Information Superiority, with defence-wide responsibility for the assessment, budgetary management and delivery of Defence's intelligence and communications capability.

In May 2007, Air Chief Marshal Dalton was chosen to be the strategic personnel (HR) director for the Royal Air Force and was selected to be the Chief of the Air Staff in July 2009. He was appointed Knight Grand Cross of the Order of the Bath (GCB) in 2012 and after a highly demanding, extended but, ultimately successful tour, he stood down as Chief of the Air Staff in July 2013. He was sworn-in as Her Majesty's Lieutenant Governor of Jersey on 13 March 2017.

An important part of the work of the Lieutenant-Governor and his wife is to support and encourage public and voluntary service. This is achieved through involvement with charities and other organisations. About 100 organisations list the Lieutenant-Governor and his wife as patron or president.



CHARLOTTE VALEUR

Charlotte Valeur has in excess of 30 years' experience in the Financial Industry as an Investment Banker in Denmark and UK and is an experienced non-executive director and Chair.

She is a regular public speaker and has delivered training in governance best practice globally. In addition, she conducts board reviews and advises boards on corporate governance through her company Global Governance Group.

Charlotte has substantial board experience as Chair of FTSE250 Kennedy Wilson Europe Real Estate Plc., NED of FTSE250 3i Infrastructure Plc., Chair of Blackstone/GSO Loan Financing Ltd, Chair of DW Catalyst Fund Ltd, NED of NTR Plc., NED of Renewable Energy Generation Ltd, NED of JPMorgan Convertibles Income Fund Ltd.

Charlotte's unlisted experience includes being a non executive director of the international engineering firm Laing O'Rourke construction and Chair of the Institute of Directors UK.

Charlotte is the Founder and Chair of Board Apprentice Global.



JOHN MILLS CBE

John was appointed in 2017 as Jersey's first Charity Commissioner, with the principal task of getting the Islands new regulatory regime for charities, in the Charities (Jersey) Law 2014, up and running. John is responsible for determining the charity test, which must be met by all entities wishing to become registered charities under the Law; and he must maintain the new charity register.

More generally, his duty is to seek to act in a way that protects public trust and confidence in registered charities, and is compatible with the encouragement of all forms of charitable giving and voluntary participation in the work of registered charities.

John's background is in the public service. For many years he held a variety of senior positions in Whitehall, including a fair spell at 10 Downing Street as a member of the Prime Minister's Policy Unit. In the 1990s he moved to local government as Chief Executive of the then Cornwall County Council, and thence to Jersey in 1999 as Chief Executive of the (then) Policy and Resources Committee.

Over the last decade or so he has held a range of non-executive posts in the statutory sector in both Jersey and the UK, including as a board member of the Financial Services Commission and as deputy chairman of the Port of London Authority. He is currently deputy chairman of Ports of Jersey Ltd and vice-chairman of the Channel Islands Financial Ombudsman. He also chairs the investment committee of the Public Employees Pension Fund.

From 1999-2017 he was chairman of governors of a leading educational charity in London, where he led the development, almost from scratch, of what has now become one of the largest independent school public benefit programmes in the country.

15.00	REGISTRATION
15.30	WELCOME AND INTRODUCTION His Excellency the Lieutenant Governor of Jersey
15.45	OPENING KEYNOTE: WHY DIVERSITY IS KEY TO YOUR SUCCESS Charlotte Valeur, Chair of Institute of Directors UK and Founder and Chair of Board Apprentice Global
16.15	TRANSIT TIME

16.30	Seminar 1 - (Rocco 1) Ensuring no one is left behind in the Digital Revolution Paul Savery , Barclays This seminar will focus on equipping charities and other community based organisations with the support and tools they need to deal with the digital revolution. The session will cover cyber security, staying safe online, how to access Digital Wings (our free online training) and how to support the communities the charities represent, particularly vulnerable clients through our Digital Eagles (staff members training in digital activity). We will also talk about the resources you can access at the Eagle Lab based at Jersey Library.	Seminar 2 - (Rocco 2) GDPR for charities - a practical guide Tara Manton , Calligo This seminar will focus on the practical implications of the new European data protection legislation, the GDPR, for charities. While most organisations are aware of the principles behind the law, and the substantial fines for non-compliance, it can be difficult to find pragmatic advice on the operational changes and documentation that are required in order to become fully compliant. This session will aim to provide useful guidance on the steps charities should take in order to do this and the key areas of greatest concern for charities, governing their undertaking but open to all.	Seminar 3 - (Noirmont Suite) Preventing disability discrimination in your undertaking Sharon Peacock , Law At Work A straight talking take on the need to know points of Jersey's disability discrimination law and its likely challenges and opportunities. Disability completes the State's anti-discrimination legislative programme and is arguably its most significant addition as, unlike other jurisdictions, the States have radically adopted 'a social model'. This model's low bar definition of disability coupled with the positive obligations on undertakings to do what they reasonably can to remove barriers (including those in premises) adversely affecting staff and customers with disabilities makes for significant cultural change and possible outlay. Pitched for those responsible for governing their undertaking but open to all.
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16.55 TRANSIT TIME

17.00	Seminar 4 - (Rocco 1) Charities & Tax Marie Vibert & Paul Eastwood Revenue Jersey: Transforming Tax Administration This session explains the long term strategy the States of Jersey is taking for collection of revenues to fund public services. It will outline how tax administration will change as it becomes a part of Revenue Jersey, gives a glimpse of future online services, and highlights some of the forthcoming changes that charities should know about and may need to prepare for.	Seminar 5 - (Rocco 2) Guide to investing for charity trustees Joel Graves , Smith & Williamson A step by step guide to what charity trustees should consider when managing donor monies. Joel has worked with the wider charities team and the outputs of their annual Smith & Williamson Charity Survey to create a best-practice guide for: cash reserve planning; designing an Investment Policy Statement (IPS); appointing and monitoring an investment manager or similar provider; and what to consider when applying investment restrictions for reputational or ethical reasons.	Seminar 6 - (Noirmont Suite) Charities Law guidance: Setting up a charitable company Christopher Scholefield , Viberts The arrival of the Charities (Jersey) Law 2014 has encouraged many local charities to revisit the basics. What manner of body are we? Do the choices made when we got started still hold good? Christopher will run through the alternative ways to structure a charitable organisation, with their respective pros and cons, and then explain how to set up, change into and operate a Jersey guarantee company, widely seen as the most modern option. Even if the guarantee company is not for you at least you will be able to say you thought carefully about it.
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17.25 TRANSIT TIME

17.30	Seminar 7 - (Rocco 1) What we learned from corporate fundraising Fiona Vacher , Jersey Child Care Trust When considering corporate fundraising, charities based in Jersey are at a distinct advantage to their UK counterparts, being located on an island with such a vibrant and successful corporate sector. This session will bring some of the theory around corporate fundraising to life, incorporate a useful tool and focus on a successful case study between the Jersey Child Care Trust and HSBC.	Seminar 8 - (Rocco 2) Top tips for working with the media Cathy Le Feuvre , BBC Ever wondered how you can get your story picked up by the (local and other) media? What could you do to help your story stand out from the crowd? Is the press release old hat these days or should we pay more attention to our social media/online presence? Just where do media people get their stories and what are the different media outlets looking for? Cathy will share her experience of working in print, radio, TV and PR – hopefully giving us all some food for thought for pitching our stories.	Seminar 9 - (Noirmont Suite) Safeguarding for charities Ruth Le Gresley , Safeguarding Partnership Board Charities and voluntary sector agencies are an essential part of the network that contribute to the safety of children and adults on the Island. A Safeguarding policy demonstrates an organisation's commitment to protecting children, young people and adults at risk, giving clear signals that the organisation takes safeguarding seriously in all aspects of its activities. This session will cover the steps you should take in developing effective policies and procedures.
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17.55 TRANSIT TIME

18.00	CLOSING KEYNOTE: An update from the Charity Commissioner: John Mills CBE
18.30	CLOSING SUMMARY AND REMARKS FROM THE HEADLINE SPONSOR: Aidan McAvinue, Director, Smith & Williamson
18.40	DRINKS RECEPTION AND NETWORKING - Kindly sponsored by: Ravenscroft
19.30	CLOSE