



Association of Charitable Foundations

# Professional Development Programme 2010



ACF is the leading provider of grant-making seminars for the UK's charitable and independent funders. To find out more visit [www.acf.org.uk/networkingevents](http://www.acf.org.uk/networkingevents)

# ACF Professional Development Programme 2010

ACF is the leading membership association for foundations and grant-making charities in the UK. Our professional development programme has been designed with grant-makers in mind and will help foundations make effective use of their resources, knowledge and learning. Covering a wide range of activities, from assessing applications to scaling up success, the seminars will benefit all those who have a role to play in the grant-making process. Many are delivered by foundations themselves, offering an insight not available elsewhere.

## AN INTRODUCTION TO GOOD GRANT-MAKING PRACTICE

For those new to the world of grant-making there are our essential seminars in the nuts and bolts of grant-making which provide a thorough grounding in best-practice approaches and ideas, and an overview of the essential components of the grant-making process. These seminars are suitable for new staff and trustees of trusts and foundations and for anyone wanting to refresh their understanding of good practice.

## PEER LEARNING AND PROFESSIONAL INSIGHTS

The seminars for more experienced practitioners invite you to explore new and innovative ways of working in depth and to learn from the experiences of those who have led in these areas of work. We have also introduced new seminars designed to help you understand the views of fundraisers, and reflect on your relationships with beneficiaries.

We hope that you will find something to interest you in our new programme for 2010.

All ACF events can be booked online at [www.acf.org.uk](http://www.acf.org.uk)

- **Level 1** - for those new to grant-making
- **Level 2** - for those experienced in grant-making
- **Level 3** - for directors of grant-making trusts and foundations
- **Level 4** - for trustees of grant-making trusts and foundations

Events are listed in level order.

Please note: A number of seminars are repeated in the second half of the year. Please check the Diary of Events on the inside back page of this brochure for a full list of seminar dates.

SEMINAR: <b>Level 1</b>	DATE, TIME & LOCATION	PRICE
<b>An introduction to grant-making</b>	<b>23-24 March 2010</b> or <b>17-18 November 2010</b> 10am – 5pm London – NCVO	<b>£295</b> member <b>£450</b> non-member

Presenter: **Melanie Griffiths**, Sir Walter St. John's Educational Charity

This two day introductory course is for those who are new, or relatively new to the grant making sector. It aims to introduce participants to some of the key aspects of grant-making in a trust or foundation context, including:

- Developing policy and guidelines.
- Making sense of applicants' accounts.
- Fairness in funding.
- Monitoring and evaluation.
- Principles of assessment.

**Please note:** These fees do not include overnight accommodation which participants must arrange themselves.

SEMINAR: <b>Level 1</b>	DATE, TIME & LOCATION	PRICE
<b>Promoting and communicating your grants programmes - attracting the right applications</b>	<b>6 May 2010</b> 12.30 – 3pm London - ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Gilly Green**, Comic Relief

This session will look at how to communicate your message and promote your programmes so that you attract the applications you want and deter those who do not fit your criteria. It will cover:

- Producing guidelines – do yours do the job they need to?
- Accessibility – use of language, layout and formats
- How to promote your funding without causing a flood of unsuitable applications

SEMINAR: <b>Level 1</b>	DATE, TIME & LOCATION	PRICE
<b>Reading applicants' accounts</b>	<b>12 May 2010</b> or <b>14 October 2010</b> 10am – 4pm London – ACF	<b>£215</b> member <b>£295</b> non-member

Presenters: **Judith Miller** and **Julie Ridgway**, Sayer Vincent

This essential and popular workshop gives grant-makers an understanding of applicants' statutory accounts and the legal accounting framework of which they are a part. Participants will leave the session understanding:

- Accounting principles and terminology.
- Balance sheets and income & expenditure accounts/SOFA, and the relationship between them.
- Key indicators and warning signs in applicants' accounts.

This seminar is aimed at those who do not have a formal financial background and who have received limited previous training. Those needing a refresher will also find it helpful.

SEMINAR: <b>Level 1, Level 2</b>	DATE, TIME & LOCATION	PRICE
<b>Assessing grant applications</b>	<b>17 March 2010</b> 11am – 3.30pm London – City Parochial Foundation or <b>25 November 2010</b> 11am – 3.30pm York - Joseph Rowntree Charitable Trust	<b>£60</b> member <b>£85</b> non-member

Presenters 17 March: **Mubin Haq** and **Austin Taylor-Laybourn**, City Parochial Foundation and **Maureen Grant**, Joseph Rowntree Charitable Trust (JRCT)

Presenters 25 November: **Juliet Prager** and **Maureen Grant**, JRCT and **Penny Vowles**, Northern Rock Foundation

This workshop is for anyone involved in assessing grant applications who wants to re-examine their practice and learn how other funders approach it. It will be an interactive session drawing on the experiences of participants as well as facilitators and will focus on three key questions:

- How do we get the information we want?
- How do we make sure we are fair and transparent in our assessment?
- What resources and technology can we use to make better assessments?

The workshop will look at the challenges raised and possible solutions to these questions. There will also be time for the group to discuss the issues raised in the workshop.

NEW SEMINAR: <b>Level 1, Level 2</b>	DATE, TIME & LOCATION	PRICE
<b>Working with fundraisers</b>	<b>15 April 2010</b> 12.30 – 3pm London – ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Nick Bell**, Chair of the Institute of Fundraisers' Trust and Statutory Special Interest Group and Trust Fundraising Manager for Sightsavers International

This session will explore the relationship between fundraisers and grant-makers in the trust sector with a view to improving efficiency in communication, therefore maximising the impact of funding. The session will be delivered from a fundraiser's perspective but will encourage dialogue to establish best practice. Topics covered will include (but will not be limited to):

- Publishing grantmaking interests and criteria.
- 'Live' communication.
- Concept notes, letters of enquiry and application forms.
- Feedback on unsuccessful applications.
- Reporting on grants.

SEMINAR: <b>Level 1, Level 2</b>	DATE, TIME & LOCATION	PRICE
<b>Monitoring and Evaluating - assessing the outcomes of funded projects</b>	<b>22 April 2010</b> or <b>11 November 2010</b> 10am – 4pm London – ACF	<b>£195</b> member <b>£280</b> non-member

Presenter: **Charities Evaluation Services (CES)**

As a funder you will want to be able to assess and demonstrate the effectiveness of your grant-making. This seminar is suitable for anyone involved in reviewing or developing a system for monitoring and evaluating grant-making. Through presentations, group work and discussion this seminar will:

- Explain the terminology and jargon.
- Provide good practice guidance.
- Help you to clarify the outputs, outcomes and impact of your funded organisations.
- Support you to develop and apply an appropriate and proportionate monitoring and evaluation system.
- Explore reasonable and feasible ways to collect information.
- Help you to interpret and use information once you have collected it.

SEMINAR: <b>Level 1, Level 2</b>	DATE, TIME & LOCATION	PRICE
<b>Grant-making and the law</b>	<b>10 November 2010</b> 12.30 – 3pm London – ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Rachel Holmes**, Farrer and Co., solicitors

A charity law expert will give a broad overview of the law as it affects grant-making, covering topics such as:

- Is a grant a gift, trust or contract? The differences and the pitfalls.
- Standards of care in grant-making – what does the law require?
- Standard terms – are there terms no funder should leave home without?

NEW SEMINAR: <a href="#">Level 1</a> <a href="#">Level 2</a> , <a href="#">Level 3</a>	DATE, TIME & LOCATION	PRICE
<b>How to make a big difference with small grants</b>	<b>15 June 2010</b> 12.30 – 3pm London - ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Alex Dodds** and **Marcus Hulme**, Big Lottery Fund

Small grants provide a lifeline for many organisations and are often the first step on the funding ladder. The Big Lottery Fund has recently completed a large-scale research study which explored the purpose, benefit and potential of small grants from the perspective of both funders and the grants recipients. Marcus Hulme and Alex Dodds from the Big Lottery Fund will highlight some of the practical recommendations from the research which will help other funders to consider how they can optimise their small grants programmes to deliver lasting impacts in the future.

NEW SEMINAR: <a href="#">Level 1</a> <a href="#">Level 2</a> , <a href="#">Level 3</a> , <a href="#">Level 4</a>	DATE, TIME & LOCATION	PRICE
<b>Making the most out of the funding relationship</b>	<b>9 June 2010</b> 12.30 – 3pm London - ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Padraic Brick**, New Philanthropy Capital

Trusts and foundations can struggle to get honest individual feedback from charities about what works well and what could be improved in funding relationships because of a fear it might affect their funding. Research shows that the way the funding relationship is managed can greatly affect the impact charities can create with the grants they receive. Drawing on research by NPC and others, this session will brief participants on:

- what charities find useful and not useful about different forms of funding,
- what charities think works well and what could be improved about monitoring and evaluation.

The session will present some key points for trust and foundation staff to consider about their funding relationships with charities, and will conclude with a discussion among participants about the possible implications of the findings for their work.

NEW SEMINAR: <a href="#">Level 2</a> , <a href="#">Level 3</a> , <a href="#">Level 4</a>	DATE, TIME & LOCATION	PRICE
<b>Branching out from grant-making</b>	<b>7 October 2010</b> 12.30 – 3pm London - the Esmée Fairbairn Foundation	<b>£30</b> member <b>£45</b> non-member

Presenter: **Dawn Austwick** and **Danyal Sattar**, the Esmée Fairbairn Foundation

In 2008 the Esmée Fairbairn Foundation established a £15million Finance Fund, building on a previous small loans programme, to provide non-grant finance to organisations whose objectives and plans fall broadly within its areas of grant-making. The Foundation is using the Finance Fund to do two things. First, to learn about and explore the options for recyclable funding. Second, to help stimulate the market for social investment.

By its very nature the Fund is an experiment and so this seminar will look at what Esmée has learned so far, using case studies of existing investments. The seminar will look at the benefits and the pitfalls facing foundations wanting to work in this field and provide a space to exchange views and ideas on the subject more broadly between peers. The seminar does not require specific financial expertise, and is suitable for managers and grant-makers, as well as financial and other operational staff.

SEMINAR: <b>Level 3 New Directors</b>	DATE, TIME & LOCATION	PRICE
<b>Foundation leadership – challenges and opportunities</b>	<b>3 February 2010</b> or <b>7 July 2010</b> 12.30 – 2.30pm London – ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **David Emerson**, Chief Executive, Association of Charitable Foundations

The job of a director of a foundation is a distinctive one, and this seminar offers a valuable opportunity to reflect upon it with others facing the same issues. Intended only for a small group, this will enable new directors to share experiences and insights on the role and potential of foundations, including responsibilities of grant-making and of managing endowments, while supporting trustees in taking forward the foundation's mission. The seminar includes an overview of recent thinking and research on foundation effectiveness.

SEMINAR: <b>Level 3, Level 4</b>	DATE, TIME & LOCATION	PRICE
<b>Scaling up success</b>	<b>10 March 2010</b> 12.30 – 3pm London – ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Amelia Sussman**, Impetus Trust

Impetus has built a strong track record in providing strategic support and expertise to enable ambitious charities and social enterprises to achieve a transformational change in their performance. Impetus supports organisations over a defined period of time to enable them to become more robust and sustainable by the end of the relationship. It brings new money into the third sector through its donor base and leverages sustainable additional value from co-investment funding and pro-bono expertise to deliver a social return to its donors. Using successful case studies, Amelia will demonstrate how this type of investment can bring about substantial change to the management and financial growth of chosen organisations.

NEW SEMINAR: <b>Level 3, Level 4</b>	DATE, TIME & LOCATION	PRICE
<b>Venturing into the unknown - emerging models of high engagement funding</b>	<b>30 September 2010</b> 12.30 – 3pm London - ACF	<b>£30</b> member <b>£45</b> non-member

Presenter: **Ben Cairns**, the Institute for Voluntary Action Research

This seminar will draw on recent research carried out with three UK charitable foundations interested in adding a 'plus' element to their grantmaking. In each case, there has been an interest to consider how best to support organisational development and sustainability above and beyond the provision of grant funding. Different approaches to this emerging practice of 'grants plus' will be described and a tentative set of critical success factors for its introduction will be discussed.

# Diary of events 2010

<b>Level 1</b>	for those new to grant-making
<b>Level 2</b>	for those experienced in grant-making
<b>Level 3</b>	for directors of grant-making trusts and foundations
<b>Level 4</b>	for trustees of grant-making trusts and foundations

The levels listed below are given as a guide only.

DATE	SEMINAR	Level 1	Level 2	Level 3	Level 4
03 February	Foundation leadership - challenges and opportunities			●	
10 March	Scaling up success			●	●
17 March	Assessing grant applications	●	●		
23-24 March	An introduction to grant-making	●			
15 April	Working with fundraisers	●	●		
22 April	Monitoring and Evaluating - assessing the outcomes of funded projects	●	●		
06 May	Promoting and communicating your grants programmes - attracting the right applications	●			
12 May	Reading applicants' accounts	●			
09 June	Making the most out of the funding relationship	●	●	●	●
15 June	How to make a big difference with small grants	●	●	●	
07 July	Foundation leadership - challenges and opportunities			●	
30 September	Venturing into the unknown - emerging models of high engagement funding			●	●
07 October	Branching out from grant-making		●	●	●
14 October	Reading applicants' accounts	●			
10 November	Grant-making and the law	●	●		
11 November	Monitoring and Evaluating - assessing the outcomes of funded projects	●	●		
17-18 November	An introduction to grant-making	●			
25 November	Assessing grant applications	●	●		

ACF is the leading membership association for foundations and grant-making charities in the UK. ACF provides help and support for the distinctive role of foundations, while respecting – and protecting – their independence. Through its services ACF provides a framework in which members can learn from each other's experience, explore matters of common concern and achieve good practice in grant-making. ACF has a strong track record of representing the common interests of foundations to government, regulators and the media. Applications for membership by foundations and grant-making charities are always welcome. For more information ring **020 7255 4499** or see [www.acf.org.uk](http://www.acf.org.uk)



Association of Charitable Foundations, Central House, 14 Upper Woburn Place, London WC1H 0AE

Telephone: 020 7255 4499, Facsimile: 020 7255 4496

Email: [acf@acf.org.uk](mailto:acf@acf.org.uk) Website: [www.acf.org.uk](http://www.acf.org.uk)

Association of Charitable Foundations is a company limited by guarantee registered in England and Wales. Company registration No. 5190466. Registered Office: Central House, 14 Upper Woburn Place, London WC1H 0AE. Registered Charity No. 1105412

As part of ACF's commitment to environmental sustainability this brochure has been printed on paper from a sustainable source, is elementary chlorine free, and the inks used are vegetable based printed with chemical free plates.

# ACF Events Programme

ACF is the leading membership association for the UK's charitable and independent funders and the gateway to a wealth of expertise, services and events specially devised for grant-makers and philanthropists, including:

- **networking** - networking opportunities on funding issues through meetings and access to ACF's website.
- **sharing good practice** - a Professional Development Programme for funders designed and delivered by top practitioners.
- **a voice for funders** - representation at a policy level with key government and sector decision makers.
- **peer support** - a protected space for charitable funders to discuss the issues that concern them.

Visit the ACF website to find out more about the benefits of becoming a member: [www.acf.org.uk](http://www.acf.org.uk)

ACF Events Programme enables members to examine aspects of their work away from the immediate pressure of grant-seekers. Where specialists from operating and fund-raising charities are invited, this is to facilitate discussion on policy issues and not to present appeals. Events range from lunchtime seminars to one-day and residential conferences, some targeted according to level of grant-making experience and others appropriate to all.

As well as our Professional Development Programme for grant-makers ACF runs a series of events throughout the year on topical and key issues. Whilst many of these events are for ACF members only, some are open to all. You can find out about all our latest events, make a booking and download this brochure at the ACF website: [www.acf.org.uk](http://www.acf.org.uk)

## EVENTS OPEN TO NON-MEMBERS

### CONFERENCES

Alternating each year between a one day and two day residential event, ACF Conference provides a mix of stimulating plenaries; lively break out sessions; interesting exhibitors and a broad range of topics relevant to trusts and foundations. The event offers the opportunity to meet with colleagues and friends from across the independent grant-making sector. In 2010 we will be holding a two day residential conference - dates and venue to be confirmed.

We also hold conference events for those funding in Northern Ireland and Wales to address issues specific to these countries.

### TRUSTEE SEMINARS

We are continuing our small group seminars specifically for trustees, run very successfully for the past three years. These explore the opportunities open to trustees of foundations and grant-making trusts, and are structured to allow participants time to reflect on new developments in grant-making; the distinct role of trustees within foundations; and to be able to discuss with peers how trusts can make effective use of all their resources. It has proved more helpful to arrange these in response to demand, and dates for these will be set, and publicised to member trusts during the year.

If you would be interested in joining one of these seminars, please contact Juliana Bell at ACF by email [juliana@acf.org.uk](mailto:juliana@acf.org.uk) or call ACF on 020 7255 4499

### SPECIAL SEMINARS

ACF holds one off events addressing specific issues of policy and practice, or professional advice on governance, the law or investments. For a full list of upcoming ACF events visit the ACF website [www.acf.org.uk](http://www.acf.org.uk)

## EVENTS FOR ACF MEMBERS ONLY

### ISSUE BASED NETWORKS

These meetings provide an opportunity for contact and discussion between foundations with common grant-making themes and/or for specific types of foundation - such as our business foundations and trusts group. All our Issue Based networks are convened by members exclusively for members and bring together diverse trusts that share an interest in specialist funding areas. For a full list of Issue Based networks visit the ACF website [www.acf.org.uk](http://www.acf.org.uk)

### NETWORKING EVENTS

Meetings for individuals working at the same level in different trusts - such as chairs or directors or those interested in specific areas of work such as policy or monitoring and evaluation. ACF's Annual General Meeting also provides an opportunity for all members to meet and discuss issues of the day.

We look forward to seeing you at an event in 2010.

# Professional Development Programme Booking Form 2010

Bookings can be made online at [www.acf.org.uk](http://www.acf.org.uk)

Additional brochures and forms can be downloaded from [www.acf.org.uk](http://www.acf.org.uk)

Please complete and return this form to ACF, Central House, 14 Upper Woburn Place, London WC1H 0AE with cheques where appropriate.

NAME OF TRUST / FOUNDATION: \_\_\_\_\_

NAME OF PERSON ATTENDING: Please complete a separate form for each person attending

JOB TITLE: \_\_\_\_\_

EMAIL OF PERSON ATTENDING: \_\_\_\_\_

TELEPHONE NUMBER: \_\_\_\_\_

ADDRESS OF ORGANISATION: \_\_\_\_\_

PLEASE GIVE DETAILS OF ANY SPECIAL NEEDS, DIETARY REQUIREMENTS, OR ANY OTHER INFORMATION:

PLEASE RESERVE A SPACE AT THE FOLLOWING EVENT(S) FOR THE PERSON SPECIFIED ABOVE:

SEMINAR	DATE	COST
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

TOTAL AMOUNT PAYABLE £ \_\_\_\_\_

PAYMENT: please tick one option

I enclose a cheque for: (payable to Association of Charitable Foundations) £ \_\_\_\_\_

Please debit my lunch account by: (members only) £ \_\_\_\_\_

To set up a lunch account, please contact Nick Neal on 020 7255 4499 or at [nick@acf.org.uk](mailto:nick@acf.org.uk)

DATA PROTECTION ACT 1998: Information supplied to ACF will be used for the purposes of event registration and administration. ACF may use this information to inform you of future events. If you do not wish to be contacted by ACF about future events please write to Sonia Sinanan at ACF, Central House, 14 Upper Woburn Place, London WC1H 0AE. We will not supply your information to any other parties.

REFUNDS: Full refunds will be given for cancellations made a week or more before the event. For cancellations within a week of the event, no refunds will be made. Full refunds of course fees will be given if ACF has to cancel the event due to insufficient numbers or other reasons, but we regret that we cannot be responsible for any other expenses.

TERMS & CONDITIONS: All ACF events may not be used to seek funds. Please sign and date to confirm you agree to the terms and conditions and to authorise your booking.

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Association of Charitable Foundations, Central House, 14 Upper Woburn Place, London WC1H 0AE

Telephone: 020 7255 4499, Facsimile: 020 7255 4496, Email: [acf@acf.org.uk](mailto:acf@acf.org.uk), Website: [www.acf.org.uk](http://www.acf.org.uk)

Association of Charitable Foundations is a company limited by guarantee registered in England and Wales. Company registration No. 5190466. Registered Office: Central House, 14 Upper Woburn Place, London WC1H 0AE. Registered Charity No. 1105412.



**Association of Charitable Foundations**