

Adapting to a changing world

Insights from Barclays'
National Charities Day 2018



Global warming is likely to affect the way we all live and do business. Every organisation, regardless of purpose, should be considering their response to the sustainability agenda. However, according to a straw poll of delegates at National Charities Day, only about a quarter (26%) said they currently measure, monitor and manage environmental targets.

Thinking about sustainability is a good way to run any organisation and makes good business sense, according to Nick Harris of the Carbon Trust. “Sustainability should be fundamentally embedded in the way everyone operates as this leads to more efficient operations, and an understanding of the risks and opportunities presented by climate change,” he says.

Nick suggests there are several simple measures that charities can take to reduce carbon emissions and

which can also help lower costs, including looking at energy efficiency, how energy is bought and putting a carbon management plan in place. Initiatives such as the Green Business Fund, which is managed by the Carbon Trust can help set charities on the right path by providing remote and on-site energy efficiency assessments and implementation advice, and conducting cost-saving workshops around the country.

Sustainable investments?

In another poll on National Charities Day we asked our audience whether climate change has been factored into their investment portfolio.

Just 15% said they have an ethical, negative screen on sectors contributing to climate change, while 11% said their investment strategy factors investment risks and opportunities around climate. But 39% said

their investment policy does not explicitly include this, while 35% did not know.

Damian Payiatakis, Barclays’ Head of Impact Investing, urges charities to speak to their investment advisers and take a close look at their portfolios with these issues in mind. And to question whether there is any misalignment between your charity’s purpose and what your funds are invested in.

The funding conundrum

A challenging economic climate, austerity and changing donor behaviour over the past few years have affected many charities and caused them to rethink and adapt their fundraising models. Some of these issues are considered in the case studies in this report.

We look at how the Science Museum Group has reimagined its operating model and developed new income streams to help it become more financially sustainable. We consider what we can learn from Sue Ryder’s efforts to take a more business-minded approach to its care services. And we hear how Stop the Traffik is using advances in technology combined with local intelligence to tackle the global human trafficking crisis.

We would like to thank all of our contributors for their outstanding work and for sharing their thoughts with us.

If you would like further information on any of these issues, please contact us.

Nazreen Visram
Head of Charities, Barclays



Applying a business mindset: Sue Ryder

How the healthcare charity has stayed true to its focus while being determinedly business-minded

Sue Ryder provides palliative care, community nurses, neurological services and bereavement support across the UK.

CEO Heidi Travis says the landscape in which healthcare charities operate is constantly evolving. Heidi worked at Marks & Spencer for more than 20 years before joining Sue Ryder in 2010. Since becoming chief executive in 2013 she says one of the most important things she's learned is that while charities should not be run as businesses, it's critical they be business-minded.

“You need to be realistic about what you want to invest in to continue to deliver on your purpose in the future.”

However, unlike the corporate world she came from, she says that a lot of decisions her team makes are literally about life and death, so they have to continually balance their passion for the charity's purpose with calm, business-minded decision-making.

Heidi Travis
CEO, Sue Ryder

Difficult decisions

“When I joined Sue Ryder the charity was so focused on its purpose it had forgotten about the business and wasn't financially sustainable,” says Heidi. “In the third sector, it's easy to believe that making money isn't important, that if we do things for the right reasons, someone will provide – but that's not always true.”

It took four years to move Sue Ryder from breakeven to financial sustainability. Heidi's team had to make a lot of difficult decisions, including restructuring the charity and making redundancies. But they have grown income by 6% annually for the past three years, while remaining true to their purpose.

Heidi believes that a charity's daily activities have to support its long-term aims. “You need to be realistic about what you want to invest in to continue to deliver on your purpose in the future. In an ever-changing world, being nimble and staying lean is critical.”

She says healthcare charities need to ensure their own house is in order and be really defined about who they are serving. “I work with fantastic people. We try to operate as a highly-governanced team, underpinned by great policies, strong compliance and robust risk processes.”

Looking ahead

Heidi believes one of their biggest future challenges will be spending money to support growth and development. Her team's five-year plan is simple: more care for more people.

One way Sue Ryder is doing this is through extending its online services. Non-existent 18 months ago, its online community now supports 16,000 people, who might otherwise have nowhere else to turn. Heidi's team is now expanding this by trialling online bereavement support.

Strong communication

“While it's important to be aware of digital developments and what they can offer, it's imperative to have key people in your organisation supporting the plan,” warns Heidi.

“You can't just build strategies that look good on paper – it's critical to remain externally aware, keep consulting about unmet needs, continue talking to your colleagues on the frontline and carry on talking to those that need you.”

“Every charity should have trustees and executives who are skilled, informed, and ready to lead and make decisions about the charity's purpose and plans.”





NATIONAL Charities DAY



RUTH DEARNLEY

CEO, STOP THE TRAFFIK

ARE WE MAKING

IS IT ABOUT MONEY
IS IT ABOUT GROWTH

PROGRESS?

MONEY IS NOT EVERYTHING
IT'S ABOUT PEOPLE

SHAPE A FUTURE THAT PREVENTS AS MUCH AS RESCUES

STATISTICS WILL NOT CHANGE THE world

LET'S SHARE OUR RESOURCES AND KNOWLEDGE

WE NEED TO RE-IMAGINE THE FUTURE

LET'S CREATE SUFFICIENCY OUT OF OUR DATA SETS

101101
100111
011011

WE NEED TO WORK TOGETHER

NONE OF US CAN CHANGE THE WORLD UNLESS WE WORK TOGETHER

THE FUTURE WILL NOT LOOK LIKE THE PAST

HEIDI TRAVIS

CHIEF EXECUTIVE, SUE Ryder

WE SHOULD BE

BUSINESS MIND

AND DELIVER GREAT VALUE

HAVE AN EYE FOR THE FUTURE

STAY CLOSE TO THE DETAIL!

KEEP LEARN AND MOVING!

WE ARE ABOUT NORMAL AND EXTRAORDINARY PEOPLE

YOU NEED THE PURPOSE AND KEEP YOUR HOUSE IN ORDER

EXTERNAL AWARENESS IS ALSO IMPORTANT

YOU NEED FINANCIAL BALANCE

THEY DRIVE ME ON!

TOM CHEESEWRIGHT

APPLIED FUTURIST

WE STILL HAVE BIG WAVE CHANGE

AND WE LIVE IN A HYPER-CONNECTED WORLD

HUMAN INTERACTION WILL BE MORE IMPORTANT THAN EVER

47% OF JOBS COULD BE AUTOMATED

TECH CAN BE AN ADVANTAGE

HUMANS PREFER DEALING WITH MACHINES

STANDING ON THE SHOULDERS OF GIANTS

RAJ PATTNI

DIRECTOR OF INSIGHTS PLATFORM, BARCLAYCARD

WE WANT TO GAIN INSIGHTS FROM THIS

IT'S ABOUT UNDERSTANDING CONSUMER BEHAVIOUR

CARD PAYMENT DONATIONS ARE MORE PROMINENT

WE SIT ON HEAPS OF TRANSACTIONAL DATA

WORK WITH WHAT YOU HAVE

ECONOMIC UPDATE

WILL HOBBS BARCLAYS

THERE COULD ALWAYS BE A RECESSION

RECESSION

THE EURO DOES HAVE A FUTURE

LONG TERM, BREXIT WILL BE FINE

JANE ELLIS

DIRECTOR OF CORPORATE SERVICES, SCIENCE MUSEUM

OUR MISSION IS

INSPIRING FUTURES

INTERACTIVE GALLERY

TURN OVER THIS YEAR HAS BEEN £1.4M

BE BOLD AND TAKE RISKS

RE-CONFIGURATION OF FRONT ENTRANCE & ACTIVE DONATION ASK

GENERATES £3 MILLION ACROSS THE GROUP

WE NEED TO KEEP BUILDING THE INSTITUTIONAL CONTEXT

IN THE 18TH CENTURY THE INSTITUTIONAL CONTEXT CHANGED

REMOVED CONTINUOUS RECESSIONS

THIS IS BECAUSE THE UK HAS A WORLD CLASS INSTITUTIONAL CONTEXT

THE ATTENBOROUGH EFFECT

DAMIAN DAYIATAKIS BARCLAYS
NICK HARRIS THE CARBON TRUST
ALEX LEVENE DESOLENATOR

VISUALISING THE ISSUE IS ESSENTIAL

THERE IS LOTS OF GOOD ADVICE OUT THERE

GREEN BUSINESS FUND

IT IS OUR DUTY TO ACT

WE ARE ALL IN THIS TOGETHER

IT'S ABOUT A STORY OF THE FUTURE

SUSTAINABILITY COMES FROM THE TOP

CARBON MANAGEMENT PLAN

TO START, PUT IN PLACE A

WHEN IT BITES IT BITES

SOLVING WORLD PROBLEMS CAN BE A BUSINESS OPPORTUNITY



Collaborating to achieve purpose: Stop The Traffik

How one charity is helping to build global networks and locally-led solutions to tackle human trafficking, the world's fastest growing crime.

Sharing intelligence and working collaboratively is vital if there is to be any hope of halting the escalating problem of human trafficking, according to Ruth Dearnley, CEO of Stop the Traffik.

Ruth came up with the idea for the charity in 2005 around the time of the 200th anniversary of the abolition of slavery.

“The issue of buying and selling people was on the rise, yet no one was talking about it,” says Ruth. “So I decided to make a noise. We delivered 1.5 million signatures to the UN to say the fight against trafficking needed to be a worldwide movement.”

“We can't change the world unless we work together and share our data and knowledge.”

Ruth Dearnley
CEO, Stop the Traffik

An estimated 43 million people are trafficked or sold into modern slavery around the world every year. It can happen to anyone regardless of age, socio-



economic background or location, so every case looks very different. This can include sexual and labour exploitation, domestic servitude, forced marriage, forced criminality and organ harvesting. The rise of the internet and technology have made it even easier for traffickers to recruit and exploit people.

“More money can be made through people trafficking than almost anything else, as you can use each person numerous times. The illicit trade in humans is estimated to be worth around \$150 billion annually. Human trafficking and modern slavery are embedded

in everything we eat and wear.

“We can't prosecute our way out of this,” says Ruth. “And for every rescue there is a vacancy. So how do we fight it?”

Intelligence-led prevention

Given the complex and organised nature of these crimes, Stop the Traffik believes that the only solution is through global collaboration and prevention through the sharing of intelligence.



To find out more about how Barclays can support your business,
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