

# Charity Marketing Conference 2014

16 October 2014

St Monica Trust, Bristol

## Welcome

Current hot topics facing professional fundraisers and charity marketers is the subject matter of this second CIM South West Charity Marketing Conference, which we are pleased to be hosting at St Monica Trust.

Communication and marketing is increasingly being recognised across the sector, as a core way to increase engagement – tangibly and measurably with supporters and stakeholders. Add to that the increasing array of media channels, technologies and the differing ways in which consumers access these channels; marketers and fundraisers within the charitable sector are facing daily challenges to continually develop their skills.

This one-day conference aims to provide you with a range of insights and practical ideas around customer and stakeholder engagement, customer experience management, communications strategies, social media and crisis communications. There are fascinating case studies and an array of panellists to put your specific questions to.



I hope you can join us and benefit from the experts we have lined up.

**Rachel Baker, Head of marketing and communications, St Monica Trust**  
CIM SW regional charity ambassador

## Booking information and enquiries

via The Chartered Institute of Marketing:

[www.cim.co.uk/64379](http://www.cim.co.uk/64379)

tel: +44(0)1628 427340

This is a CPD category 10 event



Chartered CPD Programme

## Directions to St Monica Trust

Main Hall, Cote Lane, Westbury-on-Trym, Bristol  
The SatNav postcode is BS9 3TN.

Please take the first turning left on Cote Lane which will take you into Car Park A – next to the laundry and the entrance to the main hall will be signposted from there.

A full site plan of St Monica Trust is available to **download**

**Registration:** from 09:00

**Event:** 09:30–16:45

Follow the conference conversation



St Monica Trust



This event is being kindly hosted by St Monica Trust and supported by Hobs Repgraphics

## Conference chair



**Steve Hughes, chief executive, Lilian Faithfull Homes.**

Lilian Faithfull Homes is a care home charity based in Cheltenham. Steve has been a company director for over 18 years working across sectors such as construction, IT and business consultancy. He has served on the main Board of the Institute of Directors (IoD) as a non-executive director.

## Speakers: session 1

### Understanding your customer/ stakeholder needs



**Dagmar Smeed, marketing and PR consultant**  
Dagmar is an award-winning Chartered Marketer and PR specialist, with more than 16 years in the not-for-profit sector. She has worked for the ss Great Britain Trust and The Wildlife Trusts and has led on multi-organisational campaigns. Dagmar has been fortunate to have learnt from some of the best!

### Making it work in practice – customer journey mapping/loyalty



**Jerry Angrave, managing director, Empathyce.**  
Jerry is a Certified Customer Experience Professional. He is an advisor to business leaders across many industries – leaders who want to make their organisation stronger and more efficient by knowing the real impact of the way they work on customers and employees.

### Packing a punch above your weight: stakeholder led campaigns



**\*Tony Watts OBE, chairman at South West Forum on Ageing. Managing director, Hartley Watts Communications.**  
Co-chair South West Age Action Alliance.

Tony is a highly experienced writer, communicator, campaigner and strategist who has worked in the interconnecting disciplines of PR, journalism and marketing for many years, and who is now focussing increasingly on later life issues.



\*Change to previously publicised programme.

## Speakers: session 2

Integrated communication:  
Where does social media fit in?



**Kate Doodson, director, Cosmic Ethical IT.**  
Kate manages Cosmic Ethical IT's project team. She is a self-proclaimed 'girl geek' having spent 15 years in the IT industry mostly in digital technology. Kate is passionate about ensuring businesses use the full range of IT available to give them the edge they need to thrive, particularly in the rural economy. She specialises in search engine marketing and website architecture.

A case study –  
Bath and West Community Energy



**Peter Andrews, director Bath and West Community Energy. Sustainability advisor, Bath & North East Somerset Local Strategic Partnership. Chair, Transition Bath.**  
Peter is a founding director of Bath and

West Community Energy his current role is to plan and implement the fundraising campaigns and oversee day-to-day communications. Peter used to sell life insurance door-to-door.

Managing a crisis:  
case study – St Monica Trust fire



**Jo Foster, Wide Blue Yonder PR.**  
Jo has more than 25 years' experience developing and implementing successful communications strategies for consumer, business-to-business and not-for-profit

organisations, working nationally and internationally. Today, she provides board-level counsel, developing and delivering strategies to position organisations for success, delivering significant business impact and positive change.

## Panelists: session 3

Do you have a question for our panellists?

You can tweet a question to the panel chair @NancyKChambers  
All questions submitted by 12:30 on Thursday 16 October will be considered.



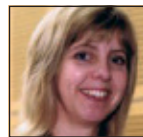
**Nancy Chambers Fundraising consultant. Chair, Bristol and Bath Development Director Group.**

Fundraising was not Nancy's chosen career! She became a fundraiser through necessity and quite simply loves it! With 25 years' charity experience in London and Bristol, she has worked as a consultant since 2008, supporting more than 30 local charities with major fundraising and communications campaigns.



**Paul Courtney, Director of development, Exeter Cathedral. Chair, Institute of Fundraising, South West.**

Paul has been working in the charity sector for over 15 years for a broad range of organisations, as a fundraiser, consultant and now as director of development at Exeter Cathedral. He is the chair of the Institute of Fundraising in the South West, which offers support, training and networking for hundreds of fundraisers across the region.



**Juliette Randall, Chief executive, Arnos Vale Cemetery Trust.**

Juliette joined Arnos Vale Cemetery Trust as chief executive in March 2011. Responsible for securing the long term sustainability of the Cemetery Juliette will enlighten us on the 'Arnos Vale approach.' Including achievements, challenges and solutions faced by a relatively new visitor attraction and working cemetery.



**Tracy Melling, Chief Executive Officer (Interim), Dorset Community Foundation.**

Tracy has worked for a wide range of regional and national charities in various fundraising roles. Prior to her current post, Tracy worked at the RNIB with corporate donors and sponsors including ASDA, British Gas and Waterstones.

## Programme

Timings	Outline
09:00 – 09:30	Registration
09:30 – 09:40	<b>Welcome and Introduction from the conference chair</b> Steve Hughes
09:40 – 12:30	<b>Session 1: Customer/stakeholder engagement and experience management</b> <b>Understanding your customer/stakeholder needs</b> Dagmar Smeed <b>Making it work in practice – customer journey mapping/loyalty</b> Jerry Angrave <b>Packing a punch above your weight: stakeholder-led campaigns</b> Tony Watts OBE
12:30 – 13:30	Lunch and networking
13:30 – 15:30	<b>Session 2: Communicating in a complex world</b> <b>Integrated communication, where does social media fit in?</b> Kate Doodson <b>A case study – Bath and West Community Energy</b> Peter Andrews <b>Managing a crisis: case study – St Monica Trust fire</b> Jo Foster
15:30 – 15:45	Tea Break
15:45 – 16:30	<b>Session 3: Fundraising – current trends and issues – panel session</b> <b>Nancy Chambers, Paul Courtney, Juliette Randall, Tracy Melling</b>
16:30 – 16:45	<b>Conference closing address</b> Steve Hughes