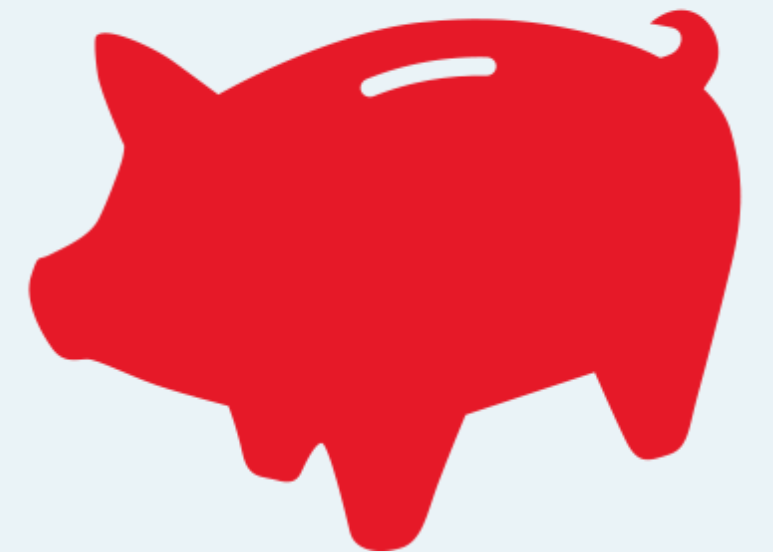


TUESDAY 24 SEPTEMBER 2024

**INSIGHTS &  
COLLABORATION  
DAY 2024**

**PROGRAMME**

**CHARITIES  
PENSIONS  
CLUB**



[www.charitiespensionsclub.com](http://www.charitiespensionsclub.com)

## **SPEAKERS & PROGRAMME - MORNING SESSION**

### Defined Benefit Topics

**10.00am - Registration and Coffee**

**10.15am - CPC annual survey results overview - Defined Benefit section (Chloe Scragg, Director, Charities Pensions Club)**

Overview and analysis of the CPC annual data benchmarking survey for DB topics.

**10.30am - How can charities and not-for-profits deliver good DB governance with limited budgets. (Pi Partnership Group)**

**10.50am - Navigating GMP equalisation, rectification and conversion: key considerations for effective Implementation.**

**(Isio and Arc Pensions Law)** As members consider the GMP equalisation, rectification, and conversion process, Isio and Arc Pensions Law are pleased to host a joint practical session designed to provide essential guidance and insights. This session will start with a member roundtable, offering a platform for members to discuss their current progress and challenges faced in GMP projects followed by a tailored session to address any concerns and guidance.

**11.30am - Short Break**

### General and Defined Contribution Topics

**11.40am - Update from The Pensions Ombudsman (David Craddock, Senior Counsel, The Pensions Ombudsman)**

The Pensions Ombudsman will be speaking to the CPC providing an overview of their role, what they're seeing in terms of complaint volumes and common complaint topics, and will share with us some of their operational changes on the horizon to help clear a historic caseload and bring down waiting times.

**12.00pm - Short walk (350m) to Baraka Restaurant for lunch.**

## **SPEAKERS & PROGRAMME - AFTERNOON SESSION**

### **General and Defined Contribution Topics**

**2.00pm - CPC annual survey results overview – Defined Contribution and general section. (Chloe Scragg, Director, Charities Pensions Club)** Overview and analysis of the CPC annual data benchmarking survey for general and DC topics.

**2.15pm - Common auto-enrolment pitfalls. (Arc Pensions Law)**

Auto-enrolment is complicated with small errors having a seemingly big impact. In this session, Arc Pensions Law will talk about some common mistakes and steps that can be taken to address them.

**2.35pm - Collective Defined Contribution (“CDC”) Pension Schemes: An introduction and overview. (Isio)**

With the UK’s first CDC Scheme; the Royal Mail Collective Pension Plan set to launch on 7 October 2024 this is likely to be a talking point for the industry this autumn.

**2.55pm - Coffee break**

**3.20pm - A Case Study on Aligning Pension Investment Strategies with Charity Values at Asthma + Lung UK**

**(Ben Clarkson, Chief Finance & Operating Officer, Parkinson's UK, previously COO Asthma + Lung UK (2020 - 24))**

During his tenure as COO at Asthma + Lung UK, Ben led a pivotal project to review the charity’s carbon emission footprint with the aim to half their emissions by 2027, recognising the need for the charity to “walk the walk as well as talk the talk” to further its mission of fighting for clean air for all. The assessment revealed that the largest source of carbon emissions was the pension default fund. In response, the organisation looked to align the fund with their mission to promote better lung health for all. Ben will share with us how he delivered this project, the challenges, bringing staff onboard and the wider impact this has had on the charity.

**3.40pm - What might the change of government mean for pension schemes and savers in the charity and not-for-profit sector. Pi Partnership Group**

**4.00pm - End**

## ● WHO CAN ATTEND?

This event is for those responsible for pensions at charities or not-for-profit organisations, and must be an employee, not a third party.

Typically attendees are COOs, Directors of Finance, Head of HR, Pension Manager etc. If you don't have a DB scheme, you are welcome to join from 11.30am onwards where we cover general and DC topics.

## ● VENUE

The event will take place at our legal partner Arc Pensions Law's offices, 100 Liverpool Street, London EC2M 2AT.

## ● HOW TO REGISTER

To register for the event, club members can sign up for free, while non-members from charities or non-profits are welcome to join for a small fee of £160, which includes complimentary CPC membership for the remainder of 2024.

To register contact us today.

T: 07504 855972

E: [chloe@charitiespensionsclub.com](mailto:chloe@charitiespensionsclub.com)

W: [www.charitiespensionsclub.com](http://www.charitiespensionsclub.com)

## OUR PARTNERS FOR 2024

Arc Pensions Law

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isio.

 Pi  
Partnership  
Confident Modern Effective



# CURRENT MEMBERS

Join our members for a day of networking and knowledge sharing. We currently have 20 charity and not-for-profit members (see below logos of our members). Typical job titles of our members include:

Pensions Manager

Group Financial controller

Head of Pensions and Benefits

Head of Treasury and Pensions

Head of Human Resources

Head of Operations

Head of Finance

Director of Finance•

Assistant Director of Pensions

Chief Operating Officer

