

**Venue**

Baker Tilly  
25 Farringdon Street  
London EC4A 4AB (*nr. Farringdon/St Paul's*)

**Timings**

09.30 Arrivals and Coffee  
10.00 Meeting start  
16.30 Meeting close

**SEMINAR OBJECTIVES**

As you grow or consolidate your social enterprise, is your current strategy still driving the business, or has the need to respond to events and developments overtaken that strategy?

This seminar will:

- Help to sharpen your focus as you look to expand or support your activities and ensure that you have considered some fundamental elements for successful growth
- Provide inspiration, insight and lessons learned using experience from social enterprise leaders plus best practice pointers from our expert panel
- Include opportunities for Q&A, group discussion as well as networking with your peers and experts

Each section will comprise an overview and best practice guide from Baker Tilly, a social enterprise case study presented by a leader, and comments from an expert panel comprising a representative from each of: Baker Tilly, BWB, Charity Bank, as well as the social enterprise leader.

**PROGRAMME****09.30 Arrivals & Coffee****10.00 Welcome & Introductions**

Jonathan Bland, Managing Director, Social Business International  
Keith Ward, Head of Social Impact Advisory, Baker Tilly

**10.15 1. Being Strategic or Following the Money**

For successful growth it is crucial for social enterprises to stay true to their mission and not be overtaken by chasing contracts in the name of income generation. Focussing on your core mission means greater social impact as well as a stronger competitive edge.

Introduction: Sarita Adams, Managing Consultant, Baker Tilly

Social Enterprise Case study: Andrew Croft, CEO, CAN

Expert Panel

**11.15 Break****11.30 2. Processes: Planned or Piecemeal**

During the growth phase it's important for a social enterprise to look at systems and processes. When these aren't integrated or streamlined it can lead to organisational inefficiencies, however balancing head and heart is a fine art!

Introduction: Simon Atherton, Finance Performance Director, Baker Tilly

Social Enterprise Case study: Louise Cooper, Director of Business Development, London Early Years Foundation

Expert Panel

**12.30 Lunch & Networking**

**13.15 3. Good Governance and Board Effectiveness**

The Board of directors (or trustees) has a role to support the social enterprise, particularly in strategy and planning. However, governance should not be a stranglehold and while the board should not lose sight of accountability it must also not micro-manage the business!

Introduction 1: Donal Lavery, Performance Improvement Partner, Baker Tilly

Introduction 2: Julian Blake, Partner, Bates Wells Braithwaite

Social Enterprise Case study: Laurie Russell, CEO, The Wise Group

Expert Panel

**14.30 4. Winning New Contracts**

Social enterprises can often find themselves with a balance sheet that appears to be weak in the eyes of procurement officers (for example no assets, no trading record). They therefore might be considered to be an unsafe bet. What does this mean for social enterprises and how can they convince public bodies that they can weather the storm in days ahead?

Introduction: Walter Akers, Partner, Baker Tilly

Social Enterprise Case study: Sarah Sharlott, CEO, Realise Futures CIC

Expert Panel

**15.15 Break**

**15.30 5. Succession Planning**

The question for many social enterprise leaders is where can they find the next generation of leaders to steer their organisation towards continued success? Do social enterprises need to be run by people with business acumen or with ideas, energy and drive?

Facilitator: Keith Ward, Baker Tilly

Discussion Panel:

Graham Bell, CEO, Kibble

Sarah Sharlott, CEO, Realise Futures CIC

Andrew Croft, CEO, CAN

Laurie Russell, CEO, The Wise Group

**16.15 Conclusions from the day**

**16.30 End**