

**Making the most of professional
and corporate support**
a practical guide for charities



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Volunteer

Introduction

A quarter of charities believe the impact of the 'Big Society' amongst other things is responsible for an increase in volunteers in the last twelve months.[†] But what type of volunteers are you attracting and are they what you need?

This guide looks at:

Corporate partnerships – how can you identify corporate partners? Get the most out of your partnership and be aware of the risks involved.

Professional volunteering – why use professional volunteers? How to attract professional volunteers and guidance on the risks you maybe exposed to.

Micro-volunteering – what makes a good micro-volunteering opportunity? How to get started and what are the potential risks for your charity.

As an insurer of the not-for-profit sector for over 125 years, we have a wealth of guidance to support you in day-to-day delivery, so you can be sure your activities are as safe and effective as possible. This guide is packed with guidance, resources, hints and tips and case studies from charities, individuals and corporates, providing expert advice from around the charity sector - we hope you find it of use.

[†] Research carried out by FWD amongst 100 charities, November - December 2012

About Ecclesiastical

- We've been insuring not-for-profit organisations for over 125 years
- Voted as the best charity insurer for the last 5 years running*
- Claims satisfaction – 97% of our commercial claims customers were satisfied with the overall service in 2012**
- 2010 winner and 2011 finalist for the Underwriting Service Award for Voluntary, Care and Education Underwriting Team of the Year
- Winner of the best use of Risk Management in Financial Services award 2011.

Our ownership & charitable commitment

We're a UK company owned by a registered charity – Allchurches Trust – and every year we give all our available profits to charity, making us one of the top 15 corporate donors in the UK***

* FWD research, 2007 - 2011 Brokers & charities voted us the best.
** Based on 215 Ecclesiastical commercial property claims customers whose claims we settled and responded to our 2012 claims survey
*** DSC Guide to Company Giving 2011/12

“ With charities looking for efficiencies or more innovative ways to deliver services, this guide looks at how you can get the professional support your charity requires and fundamentally how to manage the risks involved. It is a well rounded guide, pulling together helpful resources including hints, tips and case studies. ”

John Carlin, Quality Programme Manager, NCVO



Section 1

Corporate partnerships

What is a corporate partner?

A corporate partnership is a partnership between a charity and a commercial entity, where the commercial entity provides money, skills or other resources to the charity.

“ Corporate partnerships were typically based on the company simply raising cash for the charity – these days the relationships need to be richer, deeper and mutually beneficial. Maintaining and expanding these partnerships, and looking at new ways to raise funds and access new markets, will be crucial to succeeding in ”

Rebecca Birkbeck Guardian Professional, Friday 19 August 2011

Corporate partnerships have changed over the years and there is a greater emphasis on making it beneficial for both parties.

Example: The benefits of working together

Ecclesiastical established a three-year partnership with The Children's Society in 2006 which involved sponsorship, volunteering, fundraising and payroll giving. We were the headline sponsor for their series of Footsteps to the Future sponsored walks in 2007 and 2008 and supported the publishing of the first Good Childhood Inquiry.

Benefits for Ecclesiastical:

- Employee engagement in conversations
- Insight and understanding of risk
- Opportunities to get involved for employees
- Credibility in the charity market by leveraging their brand.

Benefits for The Children's Society:

- Funding of programme
- Research – Workplace Conversation
- Increased awareness among Ecclesiastical's employees
- Volunteering and fundraising from Ecclesiastical's employees.

This is just one way a charity can work with a corporate partner. Each charity and corporate will have different requirements.



www.childrenssociety.org.uk

Case study: a business view of charitable partnerships

In 2012, to celebrate our 125th anniversary, Ecclesiastical launched Helping Hands - an employee volunteering programme. It saw 57% of staff volunteering their time to our local communities volunteering with 88 different UK charities over the year.

Activities completed ranged from professional mentoring support, to building a duck house at a local city farm. Part of the success was due to the breadth and quality of volunteering opportunities offered to us by local charities.

Here, our Ecclesiastical's Corporate Responsibility and Partnerships Executive Liz Hunkin, describes how companies like ours select and work with suitable charities.

Choosing charities to support

As a business we receive many requests. Those that stand out are the ones that:

- Have a clear offer that's been tailored to us
- Clearly explain potential mutual benefits
- Come from a credible organisation whose ethos and mission fits with our own
- Demonstrate how they've made a success of similar relationships in the past.

When working with charities we put in place criteria to ensure both the community and the business benefited from the experience. Wherever possible we work with charities operating in our local communities and whose work aligns with our values. Each gives us a brief about the work involved so we can match it to suitable individuals or teams.

When looking for new volunteering opportunities we tend to focus on three main sources:

- 1 Opportunities with our existing local charity partners
- 2 Links with charities that our employees may have
- 3 Using the services of local volunteering organisations and websites.

Measuring impact

We always try to maintain regular ongoing contact with charities. This helps us identify what has worked well and where we've helped to make a real impact.

We asked all the charities we worked with last year to feedback on the experience. We did this in two main ways:

- Through an online survey and a Helping Hands Stakeholder group made up of key volunteering partners
- Through an end of the year review meeting attended by all. This gave us the opportunity to review the whole programme and discuss potential improvements for 2013.

Ecclesiastical volunteering 2012



Ecclesiastical
Always on your side®

What makes a good partnership?

For a corporate or volunteering partnership to succeed there needs to be:

- A good commercial fit – there should be a clear link between the organisations goals and values i.e. would the link feel natural and make sense to both the company's customers and the charities supporters
- Clear objectives and understanding of each other's targets
- Good management and commitment on both sides
- Regular and honest evaluation and measurement.

Useful resources

How to become a company's charity of the year -
The Guardian

www.guardian.co.uk/voluntary-sector-network

Charities and Commercial Partners – Charity
Commission

www.charity-commission.gov.uk/Publications

Corporate support – NCVO

www.ncvo-vol.org.uk/advice-support

Simple steps to successful relationships



Tips for getting the most from your corporate partners

Be flexible and creative

Make the most of your partnership by being open to new opportunities. By trying new things both organisations stand to gain more.

Solve problems together

Don't make yours a 'me-too' partnership based simply on what others have done. Try and push the boundaries and try to solve issues that matter to both organisations for maximum impact.

Be supportive

Small touches like mentioning a relevant piece of news from your corporate partner on your website or via your social media channels can go a long way. Build strong connections rather than just giving occasional reactive support.

Measure success and build on it

Make sure solid measures are in place from the start and conduct regular reviews. This will enable both parties to track progress against objectives. Learn from what works and attempt to consistently improve on it.

Spend time together

It may sound obvious but ensuring key people from both sides regularly meet and update each other is key. In these challenging economic times both organisations goals and medium-term objectives are likely to change to meet demands. By staying close to each other each should be clearer on how they can add value and support the other.

Identifying potential new corporate partners

It can be difficult to know where to start when looking for suitable companies to approach. Taking a 'spray and pray' approach of mass mailing or emailing a one-size fits all introduction to as many businesses as possible is unlikely to wield great results.

Taking a little more time on research will enable you to tailor your approach and demonstrate your understanding of each companies needs and values.

Tips for finding the right corporate partner for your charity:

- **Find companies who have a shared interest in a specific social issue.** For example, which companies have previously produced white papers or carried out research in your sector?
- **Get LinkedIn!** Are you a member of the main LinkedIn groups in your sector? Which companies regularly initiate or contribute? Join the conversation and start building relationships before approaching them with your proposal.
- **Ask your trustees and colleagues.** They (or their contacts, friends or partners) may have existing relationships with the companies you're looking to approach. This may help get you a 'foot in the door' that a phone call or email alone wouldn't.
- **Do your research.** Once you've identified a potential company review their website in detail. Understand their objectives, look for details of the most relevant contact and find out which charitable organisations they already work with. This information will give you a feel for the company and whether they're a good fit. It will also help you tailor your initial approach.

Useful resources

Practical guide to social media for charities - Unity Bank

www.unity.co.uk/guide

In the guide, you will find the thoughts of nearly 200 small and medium-sized charities and social enterprises on social media. The guide also includes interviews with social media experts from Twitter, Facebook and LinkedIn, all of whom give tips on how to best engage with the platforms they provide; case studies of organisations who've successfully used social media to achieve goals; a checklist of reminders and tips; and further reading.



LinkedIn

Making your proposal stand out

Identify a good strategic fit

For your charity to get noticed and gain the opportunity to work alongside a new corporate supporter you'll need to be clear why your organisation is a 'good strategic fit'.

To do this:

- Clearly show how your values match those of the company
- Get to the point - explain what corporate support you need
- Show how your proposal addresses a real social issue
- Be willing to track the business and social return on investment.

Why should a corporate work with you?

Promoting the benefits to potential new corporate partners

It is simply not enough anymore to send a letter or email to a company asking for assistance. Nowadays, the relationship between a charity and corporate needs to be richer, deeper and mutually beneficial for all involved.

These mutual benefits are often many and varied. Below are a selection of benefits that you could promote when approaching potential corporate partners. Benefits for them could be:

- Building brand awareness
- Association with your organisations campaigns
- Positive changes to brand perception
- Building credibility
- Employee engagement
- Creating new learning and development opportunities for employees
- Insight and understanding of industry issues if supporting an organisation involved in similar sector to company or its customers
- Opportunities to get closer to potential new customers.

Why should you work with a corporate?

Of course it's not all about the corporate involved, it's critical your charity benefits equally. These benefits could include:

- Funding during a time of increased financial pressure
- Increased awareness through joint PR activity
- Access to skilled and enthusiastic professional skilled volunteers
- Increased income through employee fundraising
- Raise profile locally
- Gain industry credibility.

Risks

What are the risks associated with aligning yourself with a corporate?

Complying with legal requirements

Charities and corporate partners should be aware of the legal issues involved in coming together. The onus falls to the corporate partner to make sure they comply with the law. Go to the Charity Commissions Charities Act 1992 for further information.

Protect your reputation

If you take the time to do your research and match yourself with a corporate with similar values, this shouldn't be an issue. However charities need to take steps to protect the value of their name, and where appropriate take professional advice and manage the use of their brand.

Conflict of interest

Although we recommend using connections to establish a warm lead, you must be aware that this can cause a conflict of interest and must be dealt with in a professional manner.

Ethical issues

When entering into a contract with a corporate, it is recommended that an ethical policy is agreed, that clearly outlines what businesses the charity can and cannot become involved in. This can help you safeguard the charity against damage to its name and reputation.

Insurance risks

It is essential both parties have in place adequate cover, with the main risk areas being:

- Employer's liability (includes cover for volunteering)
- Public liability
- Professional indemnity
- Trustee indemnity.

For further information talk to your insurance broker or go to: www.ecclesiastical.com/charityinsurance

Essential checks

If your partnership involves your corporate partners staff coming into contact with children or vulnerable adults, it is essential they have a criminal record check.

On 1 December 2012, CRB merged with the Independent Safeguarding Authority (ISA) to become the Disclosure and Barring Service (DBS).

The DBS was established under the Protection of Freedoms Act 2012 and will provide a joined up service to combine the criminal records and barring functions.

Useful resources

Charity Commissions Act – Charities commission
www.charity-commission.gov.uk/About_us

Disclosure and Barring Service (DBS)
www.gov.uk

Charity insurance risks
www.ecclesiastical.com/charityinsurance

Section 2

Professional volunteering

Making your professional volunteering opportunity stand out

Professional volunteers are individuals who can provide a professional service, for example an accountant, web designer, or HR specialist. They offer their service for free to the charity to deliver a project or task.

The more complex the task or project you're looking for volunteer support with the more competition you'll face. Anoop Maini of Reach, the skilled volunteering charity, gives some advice on how to stand out and attract the right volunteer for you.

"It's important to understand that skilled and pro-bono volunteering is different; roles are normally only suitable for people with a specific skill set or professional background.

Because of this, skilled volunteers are in great demand so organisations must compete for attention.

It's fine to ask for skills that may be rare if that's what you need. The most important part is to express your needs clearly, and make sure you explain how the work contributes to the organisation's work. It's also important to excite potential volunteers about your cause and what it does.

You also need to understand that it can take a little longer to find the ideal person. It's better to wait for a volunteer with the right skills than rush around talking to the wrong people.

Professional people register with Reach to use their skills. They're happy to take on complicated or responsible tasks, so give them a chance! Don't simplify the role because you want it to appeal to more people. The chances are it will actually be less attractive."



www.reachskills.org.uk

Tips from NCVO

Is what the prospective volunteer offers something you really need doing? Don't be side-tracked by their enthusiasm or technical wizardry.

Be clear about the time commitment. Have they got the time to complete the task and continue to give the support you need? There are a few websites set up in a burst of enthusiasm by someone who then found other enthusiasms or pressures, and left a community group unable to properly use it or adapt it to their needs.

Check out the level or quality you need. A leading-edge system of record-keeping or database of volunteers may be a thing of beauty to its creator, but is it really what you need? And can you and your administrator use it?

Think coolly about the plan. You may well be desperate about raising funds. But be wary of a dazzling plan about how to approach corporates or generate new income. You need your volunteer to help work out what you need, and how you cost it; and talk through what's appropriate for your organisation. You need a volunteer who can plan out with you who's going to do the work and see it through. Otherwise, you wouldn't be the first community worker to be left feeling inadequate because you don't quite know what to do with the brilliant plan.

Work out the cost. Setting up a volunteering opportunity takes you time, and colleagues may have to put time into explaining the work to the volunteer. Assess the benefit you're going to get. If the volunteer's employer is supporting them for all the good reasons, assess the cost. Or see whether your local volunteer centre can offer a brokerage programme. Work out what fee you could reasonably ask for setting up a volunteering opportunity..

**Mike Locke, Director of Policy and Communications
NCVO**



www.ncvo-vol.org.uk

Making the most of your professional volunteers

Attracting a skilled and enthusiastic professional volunteer doesn't guarantee the work will be completed. For this to happen, you'll need to make sure they're well briefed and managed throughout.

Martha Clarke, Head of Communications Services at Media Trust, suggests the following advice for getting the most from a professional volunteer:

- Write a clear brief and include a timeline
- Be clear on who is going to act as your lead contact with the volunteer in-house. They should be responsible for seeing the work through
- Make sure you have the resources to see the work through and don't expect the volunteer to wave a magic wand!
- Be honest with them about what you do and don't know
- Don't make promises you can't deliver on
- Communicate regularly with them
- Be open to creative and imaginative approaches
- Be prepared for them to be quite forthright about what they want and need.

Media Trust works with the media industry to empower charities and communities to have a voice and be heard.



www.mediatrust.org

Tips from Sue Ryder

- Remember this is a chance to offer people a window into your charity, so always make sure that you are well prepared! From making sure your buildings are clean and tidy to briefing staff, other volunteers and service users on who is coming and how they are there to make a positive difference to your charity. Make sure you create the right first impression.
- Be realistic about the time available to complete your project. Ensure it's interesting, achievable, safe and is of real benefit to your charity. And always share your results with the team.

**Duncan Willoughby, Regional Fundraiser,
Sue Ryder**

Sue Ryder Care 

www.sueryder.org

Where to find professional volunteers for your charity

Depending on the skills you're looking for, there are a wide range of websites that can help you promote your opportunity. Below are just a few:

CSV, The Professionals

CSV, the UK volunteering and learning charity, run 'The Professionals' – a project which aims to reach people who haven't previously thought about volunteering their skills. Sign up as a charity www.csv.org.uk to get matched with skilled volunteers.

Do-it.org.uk

Do-it, run by YouthNet, aims to make volunteering easy. The site has over one million opportunities to volunteer, searchable by location or type of organisation. Find out more about how you can advertise your opportunity here. www.do-it.org.uk

Reach

Reach, the skilled volunteering charity, has been connecting charities and skilled professional volunteers for over 30 years. Each year Reach's volunteers give an estimated £31m of expertise to the organisations they support. Complete their registration form to register your role. www.reachskills.org.uk

Good for Nothing

Good for Nothing is a group of professional individuals who aim to solve cause led challenges set via their website. Why not set them a challenge? www.goodfornothing.com

Give What You're Good At

Just under 3,000 professionals have donated over 190,000 hours to charities via the free Give What You're Good At platform. You can request ongoing support for larger projects or just a few hours for one-off pieces of work via the site here.

www.givewhatyouregoodat.co.uk

Pimp My Cause

Looking for marketing support or expertise for your charity? Pimp My Cause matches professional web designers, PR, design and advertising specialists with worthwhile causes. Search their registered users profiles to find the expert you need or register your cause here.

www.pimpmycause.org

ivo

ivo, the network for social change, list over 25,000 volunteering opportunities on their website. Sign up www.ivo.org to view registered volunteers and advertise your roles.

These are examples of some of the third party sites that are available. Ecclesiastical takes no responsibility for the content on these sites

Risks

When you are using volunteers from a company, either to help deliver or service or support you with running your charity, it's important to consider the roles and responsibilities of both parties. This also includes insurance, so don't assume they will be covered under their own companies' policy.

It's worth checking, and if they do have cover in place, make sure it's to the same limit of indemnity as yours, and is in force at the time. If in doubt get in touch with your broker. Normally if you are responsible for organising an event or service which volunteers are involved with, you need insurance in place to cover any potential risks including:

Public Liability

When volunteers are providing the charity with a service they may be working with the general public, and Public Liability insurance is required. Public Liability insurance protects you as a charity should a third party be injured or their property damaged arising from your negligence.

- Your insurance should explicitly mention volunteers
- Make sure the business description covers any activities planned
- Let your broker and insurer know if you are planning any new events or activities with professional volunteers.

Employers' Liability

Employers' Liability insurance covers your charity if you are held legally liable for injury to an employee or volunteer. This cover is especially important when you are using professional volunteers, as if they are injured whilst working for you, they could claim against you.

- Within the charity insurance context, some insurers treat volunteers as employees for the purpose of insurance - check this with your insurance broker or insurer to understand what cover you have.

Professional Indemnity

Using professional volunteers means that they could be providing you a professional service and if so it is essential that either they individually, or their organisation as a whole, have Professional Indemnity insurance in place. Check that it definitely covers their work whilst volunteering for the charity.

Professional Indemnity insurance primarily covers the Insured's legal liability for damages arising from:

- Any negligent act, negligent error, negligent omission or negligent breach of duty (wrongful act) in connection with the provision of professional services or advice given in relation to the business
- Any dishonest or fraudulent act or omission by any employee
- Unintentional libel and slander
- Unintentional breach of confidentiality.

Disclosure and Barring service

If your charity involves volunteers coming into contact with children and vulnerable adults, it is essential they have a criminal record check.

Before an organisation considers asking a person to make an application for a Disclosure and Barring Service (DBS) check, the responsible for ensuring that they are entitled to ask that person to reveal their conviction history.

This is due to the changes introduced in September 2012, by the Protection of Freedoms Act 2012. For further information go to the eligibility table:

www.legislation.gov.uk

Also for advice on how to countersign the new DBS application forms visit www.gov.uk

Section 3

Micro-volunteering

What is micro-volunteering?

Micro-volunteering enables individuals with a limited amount of spare time to help and support a cause, charity or other not for profit organisation by completing a small but beneficial voluntary task.

By dividing larger tasks in to bite-size chunks – typically lasting 30 minutes or less – your organisation can attract and engage with a wide range of skilled volunteers that might otherwise have not felt they had the time to support you.

From completing surveys to proof reading or submitting ideas there are hundreds of everyday tasks which could be transformed in to micro-volunteering opportunities.

Useful resources

The Institute for Volunteering Research surveyed people who volunteered

www.ivr.org.uk

Government 2011 giving white paper

www.gov.uk

“ The recent rise of micro-volunteering is indicative of the supposed changing nature of volunteering. Contrary to the altruism or strong sense of duty to others that is often associated with traditional volunteering, the overriding factor driving micro-volunteering is a self-orientated motive to occupy a short period of time. This arguably results in spontaneous and transient involvement, as the teer is more concerned about activity itself than the cause or the wider outcomes of their actions. ”

Jonathan Paylor Guardian Professional, 25 September 2012

Getting started: Where to promote your micro- volunteering opportunity

Help from Home

Help from Home provides information on over 500 micro-volunteering actions / initiatives that can all be done in a short period of time from your own home.

www.helpfromhome.org

vInspired

Independent charity dedicated to helping young people volunteer. They promote a range of micro-volunteering opportunities on their website from completing online petitions to playing games to help scientists!

www.vinspired.com

Orange

Orange has launched a micro-volunteering initiative called Do Some Good. It's an app that lets people do bite-size actions on their mobile in five minutes or less, making micro-volunteering easy. There are 12 charitable actions – from completing a charity survey to taking wildlife photos.

www.orange.co.uk/dosomegood

Useful resources

Volunteer Management and Micro-volunteering

www.helpfromhome.org

NCVO

www.ncvo-vol.org.uk



What makes a good micro-volunteering opportunity?

Mike Bright founder of HelpFromHome.org – a site dedicated to micro-volunteering opportunities identifies three main types of tasks most suited to the format:

- 1** One-off actions completed online e.g. designing a logo; providing advice to a charity etc
- 2** Repeatable actions completed online e.g. tagging photos; playing games etc
- 3** Offline actions e.g. writing letters; art or craft based tasks.

6 tips to make your micro-volunteering activity stand out

Most micro-volunteering opportunities rely on lots of volunteers completing a small task. So attracting lots of eager volunteers is key. To do this your opportunity needs to stand out from the crowd. Mike Bright suggests focusing on:

- 1** Flexibility: design your task to be lunch-break friendly. E.g. Charitii allows workers to play multiple choice crosswords with correct answers generating donations to charity
- 2** Mobile-friendly: can your task be completed while waiting for a train? You don't have to design your own app, consider submitting to Orange's Do Some Good app
- 3** Quick and easy: Keep the time to complete to a minimum e.g. Ripple enables volunteers to generate a donation just by viewing an online ad
- 4** Show progress: Visually demonstrate the impact of a volunteers actions using a league table, barometer or similar to reinforce the positive difference made
- 5** Avoid registrations: Do people need to register to complete your action? Those that don't will usually benefit from more participants. Keep the steps to taking part to a bare minimum
- 6** Be different! The more unusual the action the more word of mouth promotion you're likely to get e.g. Whale FM enables volunteers to help scientists better understand whale song!



www.helpfromhome.org

Useful resources

Charitii
www.charitii.com

Ripple
www.ripple.org

Whale FM
<http://whale.fm/>



Risks

Currently micro-volunteering is an emerging way to engage with volunteers in simple – often online based - tasks. It's a useful way to get support with simple to complete things like petitions and research.

As the world of micro-volunteering expands, it's worth thinking about what the right use of it is for your charity. If you plan to create a volunteering opportunities to complete more professional activities - such as getting quick, remote, support on things like financial advice or web design - there is a risk that you won't be getting the appropriate in-depth and specialist input you might need.

As you would in any other areas, make sure that the volunteers you are engaging are:

- appropriate
- ready to take on the tasks

And remember to offer training where appropriate.

If micro-volunteers become more involved you may need to consider reputation issues and also professional indemnity. (For more information see page 16)



Why not ask us if we can help guide you through this complex subject?

Ecclesiastical has been insuring not-for-profit organisations for 125 years. Today, we insure thousands of the nation's charities of all sizes and complexities – including youth and children's charities, pastime clubs, advice and support groups and many more. So it's no wonder we've been voted best charity insurer for the last five years running by both charities and brokers⁺.

Charities name our quality of service, our value-for-money cover and understanding of the market as key reasons why they consider us the best charity.

Speak to your broker for more information about our approach to the charity and not-for-profit sector, or visit www.ecclesiastical.com/charityinsurance to find a broker.

⁺ Of those brokers who named an insurer in the survey, the majority named Ecclesiastical as the best insurer for insurance.

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www.ecclesiastical.com/charityinsurance

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