

## Peer Leadership Group Conference 10th - 12th June 2025 Final Agenda

Theme: “Advice Fit For the Future”

| Day 1:                   | Session Theme                                              | Session Overview                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Session Leads                                                                         |
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| <b>Tuesday 10 June</b>   |                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                       |
| 1.00pm - 2.00pm          | Get to know over coffee                                    | An informal meet and greet session for those delegates who have not previously attended a CEO leadership conference to meet with other Chief Executives - network and get to learn what to expect from the conference.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Chris Roberts CEO CA Bromsgrove & Redittch and Andy Brown CEO CA Manchester           |
| 2.00pm - 5.00pm          | Wellbeing / Resilience                                     | CEOs within the Citizen's Advice network are currently navigating unprecedented financial and resourcing challenges. The weight of leadership, combined with the isolating nature of their roles, calls for space to reflect, restore, and reimagine support. This session offers practical tools and a chance to consider how as leaders we can: <ul style="list-style-type: none"> <li>• Reconnect with purpose, values, and resilience during turbulent times</li> <li>• Find strategies for boundary-setting and preventing burnout</li> <li>• Facilitate open conversation about the challenges of leadership</li> <li>• Explore ways for CEOs to ask for what they need – including from trustees – to create more sustainable working environments</li> </ul> | Jo Martyn: Bird Resilience Ltd – specialists in wellbeing for purpose-driven leaders. |
| <b>Break- Networking</b> |                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                       |
| 6.00pm - 7.00pm          | CA Executive Team: Question, Answer and discussion session | This informal session provides CEO and the Executive Team and Directors the opportunity to discuss topical issues and ask those burning questions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Angela kerr CEO CA Somerset                                                           |
| 7pm                      | Day 1 closes                                               | Dinner & networking                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | N/A                                                                                   |
| Day 2                    | Session Theme                                              | Session Overview                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Session Leads                                                                         |

## Wednesday 11 June

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| 9.30am         | Welcome / Introduction<br>Opening address                                                     |                                                                                                                                                                                                                          | Angela Kerr CEO CA<br>Somerset<br>Clare Moriarty CEO Citizens<br>Advice                                                                              |
| 10.00am        | Devolution, Regionalisation and<br>future Collaboration: Session 1 -<br>Threat or Opportunity | In session 1 we will hear from colleagues from Wales about their consortium<br>approach to delivering the Single Advice Fund on behalf of the Welsh<br>government. The session will include a presentation and Q&A.      | <b>Chair: Chris Roberts</b><br>Jane Clay CEO CA Cardiff<br>and the Vale<br>Andrew Seager Independent<br>Consultant                                   |
| <b>11.00am</b> | <b>Break</b>                                                                                  |                                                                                                                                                                                                                          |                                                                                                                                                      |
| 11.30am        | Devolution, Regionalisation and<br>future Collaboration: Session 2                            | Building on the first session; this session will take a closer look at some of<br>the practical approaches, processes and documentation Wales colleagues<br>developed as part of working collaboratively.                | <b>Chair: Jane Clay CEO CA<br/>Cardiff &amp; the Vale</b><br>Andrew Seager                                                                           |
| <b>12.30pm</b> | <b>Lunch - Networking</b>                                                                     |                                                                                                                                                                                                                          |                                                                                                                                                      |
| 1.30pm         | <b>Hot Topic Session 1</b> - hear<br>from subject experts followed by<br>a discussion / Q & A | What should our core technology platforms and infrastructure look like to<br>enable LCAs to deliver advice for the future - how are we going to develop<br>our omni channel offer to win regional contracts such as MaPs | <b>Chair: Angela Kerr</b><br><b>Keynote:</b><br>Sam Sundaram, Trustee CA<br>Sutton<br><b>Panel Members</b><br>Claire Williamson CA Cardiff<br>& Vale |
| 2.15pm         | <b>Governance - a let's think</b>                                                             | Standards of governance have been in the spotlight recently raising                                                                                                                                                      | <b>Chair: Pat Coomber-wood</b>                                                                                                                       |

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|                         | <b>dangerously session</b>                                                                            | suggestions that the current model is no longer fit for purpose. This session will open the debate around whether the current governance structure for charities is broken. And if so, how can it be fixed?                                                               | <b>CEO</b><br>Speakers<br>Samantha Pritchard - Muckles LLP<br>Tracy Hopkins CEO CA Blackpool                                                                                                                  |
| <b>4.00pm</b>           | <b>Break</b>                                                                                          |                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                               |
| 4.15pm                  | <b>Hot Topic session 2</b> - - hear from subject experts followed by a discussion and q and a session | Race disparities research insights and recommendations. How can we become more inclusive? This session will consider the next steps and recommendations from the research and provide an opportunity to share the best practice work being implemented across the network | <b>Chair: Hitesh Patel CEO CA Halton</b><br><b>Keynote speaker:</b><br>Alice Moore - CA Head of EDI<br>Mandeep Rupra - Director of Equity & Belonging<br><b>Panel Member</b><br>Nick Morgan CEO CA Chapeltown |
| <b>5.15pm</b>           | <b>Break</b>                                                                                          |                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                               |
| 6.00pm                  | New to the service CEOs<br>Regional Reception                                                         | An interactive session for new CEOs to raise questions and comments and learn from their colleagues<br>Opportunity to meet regional colleagues                                                                                                                            | <b>Hosted by Chris Roberts</b><br>CEO Redittch & Bromsgrove                                                                                                                                                   |
| 7.00pm                  | Day 2 closes                                                                                          | Dinner                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                               |
| <b>Day 3</b>            | <b>Session Theme</b>                                                                                  | <b>Session Overview</b>                                                                                                                                                                                                                                                   | <b>Session Leads</b>                                                                                                                                                                                          |
| <b>Thursday 12 June</b> |                                                                                                       |                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                               |

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| 9.30am         | Transformation Programme - exploring emerging areas of shared focus in Mission 1: Provide Advice Fit for the Future. | An opportunity to share your knowledge of where progress is already being made, along with your insights and ideas for how we can collaborate across the service to innovate and learn in these areas. | Lucy Mitchell-Claire<br>Richard Spreight |
| <b>10.30am</b> | <b>Break</b>                                                                                                         |                                                                                                                                                                                                        |                                          |
| 11.00am        | Transformation programme                                                                                             | Continued discussions                                                                                                                                                                                  | Lucy Mitchell-Claire<br>Richard Spreight |
| 12.30pm        | Conference closes                                                                                                    | Lunch is available on a pay per person basis                                                                                                                                                           |                                          |