



In association with:



## Invitation: 'Charity Spring Update'

**FREE** seminar for our charity clients and friends

**Date:** Tuesday 30<sup>th</sup> April, 9.00am – 12.00pm

**Location:** Liverpool Quaker Meeting House, 22 School Lane, Liverpool L1 3BT

Complimentary breakfast rolls and drinks will be provided on arrival with a break for refreshments mid-morning.



**We have invited an excellent line-up of speakers to provide updates and share their expert opinions on some of the key topical issues:**

### Agenda:

#### Introduction/Overview

Peter Taaffe will provide a introductory overview to the seminar and our expert speakers. He is also tasked with providing an update reflecting on the Chancellor's Spring Statement and the latest Brexit developments! He will join the speakers for a Q&A session at the end of the morning.



#### Charity Finance Update

The Team will then provide an update on topical finance and accounts matters including a SORP (Statement of Recommended Practice) update, the latest on Gift Aid requirements, Year-end and Reserves Best Practice, and (linking with the cyber talk following later in the morning) safe procedures for inputting and authorisation of invoices.



#### Charity Legal Update

Reflecting on the latest legislation changes affecting charities today, Jonathan Askin will give an informative round-up of legal developments in the voluntary sector and share practical advice to help charities of all sizes to prioritise the key factors in ensuring good governance. He will also endeavour to give a useful steer on what the future might hold in terms of charity regulation and the role of the Charity Commission.

#### Procurement/funding update

Peter Cumings of Tender Management Community Services will reflect on the changes, complexities and challenges of securing public sector service contracts in the ever more competitive public sector commissioning and procurement marketplace. Looking at Governmental, Local Authority, NHS and Clinical Commissioning Group commissioning priorities and procurement perspectives, themes and trends and discussing how to compete more effectively in this increasingly demanding and crowded marketplace.



#### GDPR 1 year on/ Cyber security update

With almost a year of the General Data Protection Regulation in place, we have invited expert Nick Holden to update on how GDPR has been embraced (or not!) and remind us of the responsibilities under GDPR, and ensuring that updated processes and procedures are in place. Nick will also reference the new charity digital code of practice covering the latest thinking on protection from cyber crime.





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**More about our expert speakers:**



**Peter Taaffe, Managing Partner, BWM**

Peter’s blend of skills from his FCA & CTA qualifications and practice experience provides clients with a broad perspective on financial matters and practical advice. His focus is on improved business performance and enhanced value for clients, working with a variety of SME and charity projects. He has been a member of the Committee of the Institute of Chartered Accountants in England & Wales Charity and Voluntary Community and is also currently a trustee at Open Awards.



**Jonathan Askin, BLM**

Jonathan Askin is a Commercial Partner at BLM. He advises clients from the private, public and not-for-profit sectors on a wide range of governance, commercial contracts and legal issues. Jonathan has acted for various clients in the not-for-profit sector over the last twelve years and also previously spent a year as Senior Legal Counsel for the UK Government.



**Peter Cumings, Tender Management Community Services**

Peter is the director of Tender Management Community Services, a public sector tendering consultancy that helps not-for-profit sector service providers compete more effectively for public sector contracts across an extensive range of health, personal and social care, and support services including carer support, respite, hospital avoidance and rapid discharge, supported housing, family intervention, advocacy, recovery and personal support services.



**Nick Holden, Nexus Protect**

Nick is experienced in managing a demonstrated history of work strategically in the corporate security & resilience functions. He is skilled in Operational Management, all aspects of physical, people, information and cyber security, investigations, data protection (GDPR) and other specialist security disciplines.