

---

## Invitation: 'Charity Spring Update'

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

**Date:** Tuesday 26 April, 9am – 12.30pm

**Location:** BWMacfarlane offices, 6th Floor, Castle Chambers,  
43 Castle Street, Liverpool L2 9SH

Complimentary breakfast rolls and drinks will be provided on arrival with a break for refreshments mid-morning. There will be a light buffet lunch at the end of the talks, where you are invited to stay and network.



---

**With so much going on in the charity sector we have invited an excellent line-up of speakers to provide updates and share their expert opinions on some of the key topical issues:**

### Key Performance Indicators (KPIs) and dashboards



For many organisations finance doesn't have to be complicated and full of jargon; or all about the profit and loss or balance sheet. Darren from Spotlight will explain how organisations can look deeper at how they perform and measure what matters, setting themselves clear defined goals and objectives and reviewing performance regularly with their trusted advisers.

### 'How we present the data we capture, so that it helps us to make better decisions'



Following on from the KPI talk above, this real-life case study explains the process of co-designing a dashboard (a useful exercise in itself to reflect and agree on what is important) – and then how Mencap Liverpool have gone about making this an indispensable 'live' document, understood and used by staff and trustees.

### How to recruit a truly effective board



With so much scrutiny of charity boards in recent times, finding the right Trustees for your not-for-profit organisation is more important than ever. Yet with so much pressure on boards how do you attract the right people? And if you are an individual considering joining a board of trustees, how do you choose the right role that will inspire and motivate you whilst using your skills and experience to best effect? Hear from experienced leaders and recruiters in the charity world, Bruce Tait and Victoria Symes, about how to find, keep and get the best from your board members in an informal yet informative tour of their experiences, insights and tips for success.

### An introduction to charity VAT – the opportunities and pitfalls



This session will aim to unravel some of the complexities of VAT for charities. As well as discussing steps that a charity can take in order to ensure compliance with VAT law and minimise the risks associated with non-compliance, using case studies and practical examples, Rob will explore some of the reliefs and opportunities that potentially allow charities to improve their VAT position.

### Finance matters and more



Reflecting on the latest guidance and updates from the Charity Commission, HMRC and wider sources, this talk from our own Partners Peter and Lesley will extract the pertinent points in an easy to understand and pragmatic manner. In particular they will focus on the latest developments in trustee responsibilities, the Charities SORPs, fundraising developments and practical advice on managing a Charity's finances.

---

Invitation: **'Charity Spring Update'**

**FREE** seminar for our clients and friends

**More about our expert speakers:**



**Darren Glanville, Director of Sales UK**

A software veteran of over twenty years including working for some of the biggest names in the accounting software space with Sage, CCH and more recently Xero. Darren now heads up the UK operations for Spotlight Reporting - a cloud based reporting platform. Darren is passionate about helping small organisations become more efficient and profitable making the most from the opportunities that the transformation from desktop to cloud software can bring.



**Sarah Jones, Chief Executive**

Sarah became Mencap Liverpool's first CEO in July 2009 and has worked in and with the local voluntary sector since graduating in 2001. She is passionate about the power of small charities to effect big change. Having spent all her adult life in Liverpool, Sarah is also passionate about the city, its people and its personality.



**Victoria Symes & Bruce Tait, Directors**

Victoria Symes has spent over 15 years helping not-for-profits in the charity, education, heritage and arts sectors develop their strategic and fundraising capacity. Victoria has helped organisations recruit and develop new staff and is herself on a number of boards and committees.

Bruce has worked for the voluntary sector for over 25 years and has recently been named as a Fellow of the Institute of Fundraising. Following roles as Director of Fundraising and Chief Executive at several national charities, Bruce set up Bruce Tait Associates in 2007 to help charities find and recruit great staff before joining Victoria in 2015 to set up Charity Careers North West. Like Victoria, Bruce is also on a number of boards.



**Rob McCann, Director/ VAT Services**

Rob is responsible for providing high quality advice to large corporate groups and other businesses within the private sector. Furthermore, Rob is a leading provider of VAT solutions to housing associations, charities and other not-for-profit organisations. Although Rob advises on all areas of VAT legislation, particular specialisms include partial exemption, land and property, international trade and issues affecting the charity/not-for-profit sectors. Rob's recent successes include the negotiation of 'special' VAT recovery methods for several not-for-profit organisations, leading to significant refunds of additional VAT, the restructuring of a property deal to remove a potential liability of more than £1 million and negotiation with HMRC to remove a VAT assessment issued to a corporate body of more than £1.5 million.



**Peter Taaffe, Managing Partner / Lesley Malkin, Audit Partner**

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 is a member of the Committee of the Institute of Chartered Accountants in England & Wales Charities and Voluntary Sector Special Interest Group.

Lesley trained and spent nine years with PwC, qualifying with them as a Chartered Accountant. Her time there included four years as an audit and business development manager in audit and general practice, coordinating client service, before joining a 5 partner firm of accountants as an Audit Manager in 1989. She joined BWMacfarlane in 2000 and became Audit Partner in 2010. Lesley has been a director of a charity for many years, acting firstly as honorary treasurer, then as company secretary chairing committees.