



Steve Parkinson Partnership Training

September to December 2023

**Virtual Continuing
Professional Development
For Town and Parish
Clerks & Councillors in
Cumbria**



Steve Parkinson Partnership Training

CALC work alongside The Steve Parkinson Partnership to provide finance training, in furtherance of what CALC provides in house.

Trainers

Steve Parkinson, The Parkinson Partnership LLP

Steve is a former Town Clerk & an accountant with 30 years' experience in public sector finance, who specialises in advice & training for the local council sector.

Tim Light, Lightatouch

Tim has 29 years experience of internal audit with Hampshire County Council. A past President of the Association of Accounting Technicians, he has undertaken internal audits at parish councils for the last ten years and delivers training on related topics.

Course Information

The training is provided in interactive sessions, you will need a device with a reasonable screen size such as a PC, laptop or tablet to be able to participate fully.

Your booking confirmation will contain a link to the online event. Please ensure that you log in at least 10 minutes before the session starts, make sure that your screen name includes your first and last names.

How to Book

Contact CALC, and we will arrange the booking for you



Once you have registered you will be sent a link a week before the event for you to join the meeting virtually.

Look out for emails with details of additional courses we will run which have been requested by you.



Councillor Finance training

Topic	Course content	Proposed dates	Cost
<p>Finance for Councillors</p>	<p>This session is for councillors only and is designed to give them a greater understanding of their duties with regard to the council's finances.</p> <p>Topics include:</p> <ul style="list-style-type: none"> • Roles and responsibilities • setting a budget and precept • Financial control • The Annual Governance & Accountability Return • Internal and external audit • How VAT applies to local councils <p>By the end of the session you will:</p> <ul style="list-style-type: none"> • Understand the council's duties regarding financial management • Be aware of relevant legislation and sources of guidance • Be aware of how the council's accounts are prepared and audited • Recognise the importance of internal controls • Understand how VAT law applies to your council 	<p>05 September 2023 – 10am</p> <p>12 September 2023 – 6.30pm</p> <p>26 September 2023 – 10am</p> <p>05 October 2023 – 10am</p> <p>10 October 2023 – 6.30pm</p> <p>17 October 2023 – 10am</p> <p>02 November 2023 – 10am</p> <p>07 November 2023- 10am</p> <p>14 November 2023 – 6.30pm</p> <p>30 November 2023 – 10am</p>	<p>Cost for members</p> <p>£30 per session</p>

Internal controls

Topic	Course content	Proposed dates	Cost
Internal Controls	<p>This session give councillors and clerks an understanding of the need for internal controls and how they work, with practical examples and case studies.</p> <p>Topics include:</p> <ul style="list-style-type: none"> • Roles and responsibilities • Financial risks • Purpose of internal controls • Case studies • Examples of controls • Review of internal controls <p>By the end of Local Council Finance you will:</p> <ul style="list-style-type: none"> • Understand the council's and RFO's duties regarding internal control • Be aware of the purpose of internal controls • Be able to identify examples of internal controls • Know when to review internal controls 	<p>27 September 2023 – 10am</p> <p>08 November 2023 – 10am</p> <p>13 December 2023 – 10am</p>	<p>Cost for members</p> <p>£30 per session</p>

Procurement

Topic	Course content	Proposed dates	Cost
Procurement	<p>For anyone involved in procuring goods and services, preparing tenders or entering into contracts on behalf of local councils.</p> <p>This session is an introduction to the basics of procurement for local councils – inviting quotes, producing specifications and tender documentation, achieving competition and value for money, managing contracts.</p> <p>Topics include:</p> <ul style="list-style-type: none"> • Procurement thresholds • Basic terminology and steps involved in procurement • Estimates, quotes and tenders • Specifications • Quality and value for money • Advertising, including Contracts Finder <p>Session benefits:</p> <p>By the end of Contracts and Procurement you will:</p> <ul style="list-style-type: none"> • Be aware of procurement thresholds • Recognise when you must advertise on Contracts Finder 	<p>12 September 2023 – 10am</p> <p>12 October 2023 – 10am</p> <p>28 November 2023 – 10am</p>	<p>Cost for members</p> <p>£30 per session</p>



	<ul style="list-style-type: none">• Understand how to produce a specification for what you want• Understand the basic terminology and steps involved in procurement• Be able to ensure your procurement achieves value for money		
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VAT for unregistered councils

Topic	Course content	Proposed dates	Cost
VAT for unregistered councils (VAT126)	<p>For clerks, finance staff and councillors from councils that are not VAT registered, but reclaim VAT using Form VAT126.</p> <p>This session explains how VAT affects local councils. Essential for any council contemplating major building projects.</p> <p>Topics include:</p> <ul style="list-style-type: none">• how VAT law applies to local councils• where to find the law and guidance• business and non-business activities• understanding whether sales are taxable or exempt from VAT• when a council must register for VAT• when VAT can be reclaimed• Partial exemption• Reclaiming VAT when using grants and donations <p>By the end of this session you will:</p> <ul style="list-style-type: none">• Know where to find the relevant legislation and guidance	<p>28 September 2023 – 10am</p> <p>31 October 2023 – 10am</p> <p>12 December 2023 – 10am</p>	<p>Cost for members</p> <p>£30 per session</p>



	<ul style="list-style-type: none">• Understand the key concepts of VAT• Know when a council can or can't reclaim VAT• Recognise when a council must register for VAT• Be aware of activities that require special attention		
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VAT for registered councils

Topic	Course content	Proposed dates	Cost
<p>VAT for VAT registered councils</p>	<p>For clerks, finance staff and councillors from councils that are VAT registered, who wish to develop their knowledge (VAT registered councils have a 9-digit registration number, submit quarterly VAT returns online and charge VAT on taxable sales. If your council submits a VAT126 claim, it is not VAT registered).</p> <p>This session explains when and how VAT registered local councils charge VAT, when they can reclaim it and when they can't. Essential for any council contemplating major building projects.</p> <p>Topics include:</p> <ul style="list-style-type: none"> • how VAT law applies to local councils • where to find the law and guidance • business and non-business activities • understanding whether sales are taxable or exempt from VAT • when to charge VAT • VAT rates • when VAT can be reclaimed • VAT returns • Partial exemption • Non-business activities 	<p>03 October 2023 – 10am</p> <p>07 December 2023 – 10am</p>	<p>Cost for members</p> <p>£30 per session</p>

	<ul style="list-style-type: none"> • Reclaiming VAT when using grants and donations <p>By the end of this session you will:</p> <ul style="list-style-type: none"> • Know where to find the relevant legislation and guidance • Understand the key concepts of VAT • Know when a council can or can't reclaim VAT • Recognise when a council must charge VAT • Be aware of activities that require special attention 		
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Budgeting for Clerks & Finance Staff

Topic	Course content	Proposed dates	Cost
Budgeting for Clerks & Finance Staff	<p>This session is aimed at officers of parish & town councils, who are involved in preparing and monitoring budgets.</p> <p>Topics include:</p> <ul style="list-style-type: none">• setting a budget and precept• Contingencies and reserves• how the council tax base affects the budget• Inflation• budget monitoring <p>By the end of this session you will:</p> <ul style="list-style-type: none">• Understand how and when to prepare a budget• Know how to approve and issue a precept• Be aware of the factors that affect a budget• Understand how to manage a budget	<p>14 September 2023 – 10am</p> <p>10 October 2023 – 10am</p> <p>19 October 2023 – 10am</p> <p>09 November 2023 – 10am</p> <p>14 November 2023 – 10am</p> <p>23 November 2023 – 10am</p>	<p>Cost for members</p> <p>£30 per session</p>



New Clerks Finance

Topic	Course content	Proposed dates	Cost
New Clerks Finance	<p>This introductory session is FREE for inexperienced clerks in their first year and is designed to give them an overview of a council's year, along with a basic understanding of the RFO's role.</p> <p>If you have 9 month's experience or more, this session is unlikely to cover anything you don't already know. Please leave this session for very new clerks and book yourself onto the more detailed sessions on Budgeting, Internal Control, The Role of internal audit, Procurement, Year-end and VAT instead.</p> <p>Bookings by experience clerks may be removed without notice.</p> <p>Topics include:</p> <ul style="list-style-type: none">• Roles and responsibilities• Setting a budget and precept• Internal control• The Annual Governance & Accountability Return• Internal and external audit <p>By the end of the session you will:</p> <ul style="list-style-type: none">• Be aware of relevant legislation and sources of guidance	<p>19 September 2023 – 10am</p> <p>16 November 2023 – 10am</p>	FREE



	<ul style="list-style-type: none">• Be able to describe the key financial activities in a year• Be aware of how the council's accounts must be prepared and audited• Recognise the importance of internal controls		
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Booking your Development Session

To Book a Place on a Steve Parkinson Finance course:

Email calc@cumbria.gov.uk

Tell us the name and the date of the course you want to book. Provide the names of the delegates and a contact email address for each person. We'll send an invoice to the clerk of the council once the training is completed. We'll send joining instructions to the delegate, usually about 7 days so before the session is due to run. Invoices and joining instructions will be sent by email. If you're booking for yourself, remember to obtain the relevant approval for expenditure from your council.

All our courses are available to non-members please contact CALC for more details including costs.

Cancellations

If you cancel your place 7 days before the course is due you will not be charged. If you cancel more than one day but less than 7 days before the course you will be charged 50% of the course fee. If you cancel less than 24 hours before the course or do not attend you will be charged the full amount.

Sometimes it is necessary for us to cancel or reschedule a session. We will always give you as much warning about this as possible. If you haven't heard from us, please don't assume a session isn't running – your joining details will usually be sent out 7 days before the session is due to run.

CALC also ask external speakers to deliver half or full day events during the course of the year. Watch out for the Wednesday update emails for such events.