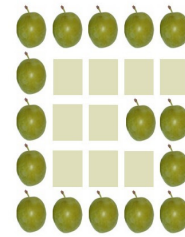


MDN Member: **Frank Learner**  
Business: Greengage Associates  
Contact: 8 Ffordd Cwm Cidi  
Barry  
Vale of Glamorgan CF62 6LH  
01446 700183



**Greengage**  
**- Associates -**

frank.learner@greengageassociates.co.uk  
www.greengageassociates.co.uk

## **Specialisms**

### Main areas of interest

- Added-value charity financial reporting:
  - Going beyond basic compliance to present your annual report and accounts in the way that best promotes your charity.
  - Exploiting the potential of the annual report and accounts as an additional fundraising tool through using the many reporting options available.
  - Supplementing the annual report with an annual review.
- Financial management:
  - Sound basic procedures (budgeting, cash flow management, internal controls etc) demonstrate effective use of resources to funders.
  - A financial input to the strategic plan is a key element in achieving sustainability - developing a strategic cost model
- Risk management:
  - Not just compliance - getting delivery right first time and taking necessary precautions.
  - Guiding your charity on risk categorisation and mitigation.
- Independent Examinations - the 'lighter touch' alternative to audit for smaller charities.
- Writing:
  - Proof-reading, copy editing and drafting - manuals, reports, web content and articles, etc.
  - Added-value if combined with my other specialisms.

### Type of work done

- Open courses
- In-house training
- Short consultancies
- Projects

Sector: Any, but focussed on the small/medium charity with limited specialist resources in-house.

**Geographical Area Covered:** All of England & Wales.

**Work Experience:** I established Greengage Associates in 2005 after spending most of my working life in the Royal Air Force - where my last role was treasurer of the Service's major recreational grant-making charity. I now undertake consultancy and independent examination work for charities, and am also a trainer for the Directory of Social Change and Institute of Fundraising.

### **Publications:**

- Governance magazine: Trustee issues arising from a fatal accident caused by volunteers.
- Charity Comms website: The Value of your Annual Report.

**Qualifications:** Full member of Association of Charity Independent Examiners. Common Purpose Cardiff Matrix course 2007 graduate.

**Other information:** Trustee Treasurer of Community Foundation in Wales. Charity Finance Directors Group South West & Wales Regional Committee member. Media Trust adviser.