**Treasurer Role Description**

Being a trustee is a stimulating role that is at the very heart of a charity and its work.

Together with a team of like-minded people it really is possible to make a tangible and positive difference to the lives of older people in Barnet. This role is suited to candidates who can demonstrate experience of both a financial and strategic background.

**What is the purpose of this role?**

Age UK Barnet has a Board of eight trustees who ensure Age UK Barnet has a clear strategy, and that our work and goals are in line with our vision. The Trustees are the ‘guardians of purpose’, making sure that all decisions put the needs of our beneficiaries first. The Trustees have independent control over, and legal responsibility for, the charity’s management and administration, and the role of the Treasurer is to maintain an overview of the charity’s affairs, ensuring its financial viability and ensuring that proper financial records and procedures are maintained. All Trustees will act as ambassadors and in the best interests for Age UK Barnet and the wider Age UK family of charities.

**What impact does this role have?**

Our Trustees are the people who lead the charity and decide how it is run. Being a Trustee at Age UK Barnet means making decisions that will impact on people’s lives. As a Trustee you will make a difference to your local community and through the Age UK Network, to society as a whole. Our Treasurer supports the work of the board through their specialist financial and commercial experience, and also works closely with our Finance Team.

**Treasurer role description**

Role Location: Barnet:

You will be supported by other Members of the Board of Trustees and The Senior Leadership Team

**What are the responsibilities of the role?**

The Treasurer’s responsibilities include the following:

• To oversee and present budgets, accounts and financial statements, and to formally present these accounts at the annual general meeting and draw attention to important points in a coherent and easily understandable way

• To ensure the financial resources of the charity meet its present and future needs

 • To ensure the charity has an appropriate reserves policy

 • To present financial reports to the board

• To ensure appropriate accounting procedures and controls are in place

• To liaise with the Chief Executive and Finance Manager about financial matters

• To advise on the financial implications of the charity’s strategic plan

• To support the Board in ensuring that the charity has an appropriate investment policy

• To support the Board in ensuring that there is no conflict between any investments held and the aims and objectives of the charity

• To support the Board in monitoring the charity’s investment activity and ensuring its consistency with the charity’s policies and legal responsibilities

• To ensure that the accounts are audited and prepared in accordance with SORP and company law, any auditors’ recommendations are implemented, the accounts are included in the annual report and are submitted to the relevant statutory bodies, e.g. the Charity Commission and Registrar of Companies

• To keep the board informed about its financial duties and responsibilities

• To contribute to the fundraising strategy of the charity

**What are we looking for?**

This role is suited to candidates who can demonstrate experience of both a financial and strategic background.

The Treasurer must have:

• Integrity

• A commitment to the charity

• An understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship

• A willingness to devote the necessary time and effort to their duties as a trustee

• Strategic vision

 • Good, independent judgement

• A willingness to speak their mind

• An ability to work effectively as a member of a team

• Financial experience and business planning skills

• Some experience of charity finance and fundraising

• The skills to analyse proposals and examine their financial consequences

• A preparedness to make unpopular recommendations to the board

**What is the time commitment?**

• The charity holds eight full board meetings per year in East Finchley, with each meeting lasting around two hours

• In addition, Trustees need to ensure at least an hour reading time before each board meeting

• There may be specific occasions when a Trustee is required to attend an event such as staff meeting or away day.

• The charity board also has a Finance Committee which meets separately. As Treasurer you would be required to sit on this committee and attend the additional meetings and provide support to the organisation’s finance manager.

• Trustees serve a three-year term of office and can be re-elected, by exception, to serve an additional three-year term

 **What training will you be given?**

You will be given an induction to the Charity and an opportunity to spend some time with the CEO, Senior Management Team and other key members of staff including the Finance Manager.

There will also be a full suite of training on offer to help you develop in your role.

**What can you gain from this opportunity?**

Trusteeship can be rewarding for many reasons, from a sense of making a difference, to gaining new experiences and new relationships.

Please note the following key information before you submit an application:

 • You must be at least 18 years old

 • You must be properly appointed following the procedures and any restrictions in the charity’s governing document

• The role of a Trustee is voluntary and is not accompanied by any financial remuneration

• You must not act as a trustee if you are disqualified under the Charities Act, including if you have an unspent conviction for an offence involving dishonesty or deception (such as fraud), are bankrupt or have entered into a formal arrangement (e.g. an individual voluntary arrangement) with a creditor or have been removed as a company director or charity trustee because of wrongdoing.

 **How to apply**

If you would like an informal, no-obligation discussion about the role, our Chair of Trustees will be happy to discuss this further with you. Please email our Volunteer Manager Lisa Robbins - volunteering@ageukbarnet.org.uk and we can arrange this for you.

If you would like to apply for the Treasurer role, please also contact Lisa.