



TREASURER RECRUITMENT PACK

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A Message From Our Chair

I am delighted that you are interested in the role of Treasurer at Age UK Bromley & Greenwich (Age UK B&G)

Age UK B&G is a local, independent charity, responsible for its own income generation and expenditure. Working across the London Borough of Bromley and The Royal Borough of Greenwich, to ensure that all can enjoy later life.

This is an exciting time to join Age UK B&G as we begin the work on developing our new organisational strategy. With an increasingly ageing population, a continuing cost of living crisis and a post Covid environment which has highlighted the high levels of social isolation among older people, our services have never been more important.

You will be joining an established and ambitious board to help us develop our vision for age friendly communities and services.

We are proud of the work undertaken by our 80+ staff and 200 volunteers and the work undertaken in partnership with other voluntary organisations, statutory and health colleagues. If you are excited by our vision for older people in Bromley and Greenwich and believe that you bring the skills and experience we need, we would love to hear from you.



Lorna Blackwood - Chair of Trustees

Our Strategy

Vision:

To make Bromley and Greenwich places where all can enjoy later life.

Mission:

Age UK Bromley & Greenwich will be the voice of older people in both boroughs.

We will work with older people to enable, support and connect.

We will promote independence and well-being.

Values:

Equality - We value diversity and strive to give equality of opportunity.

We believe that the organisation and society is enriched by its diversity.

Respect - We respect the life histories of our staff, volunteers and clients.

We believe in their potential and we will help to realise their ambitions.

Creativity - We encourage innovation in the solutions we adopt.

8,902

CLIENTS ACCESSING SERVICES

7,960

REFERRALS MADE

34,690

CONTACTS WITH CLIENTS

"I don't know what I would have done without your services"

Our Services

Age UK Bromley & Greenwich is the only specialist agency working across both boroughs with and for older people. We can provide a variety of services to assist you as follows:

- **Bromley Dementia Support Hub (working with BLG Mind)**
- **Care Navigation**
- **Clip It Nail Cutting**
- **Health, Wellbeing & Befriending Development Greenwich**
- **Information & Advice Greenwich**
- **Memory Singers Choir (working with the U3A Bromley)**
- **Eltham and Penge Sheds**
- **Nepalese Gurkha Veterans Project**
- **Shopping Bromley**
- **Shopping Greenwich**
- **Take Home & Settle Greenwich**
- **Take Home & Settle Lewisham**
- **Volunteering**

Bromley Well

We also work in partnership with Bromley Well to offer a further range of services in Bromley as follows:

- **Adult Carers Support**
- **Befriending Bromley**
- **Care Navigation**
- **Forms Completion**
- **Handyperson**
- **Hospital Aftercare**
- **Information & Advice Bromley**
- **Long Term Health Conditions**
- **Sitting**
- **Take Home & Settle Bromley**
- **Volunteering**

The Role

The Treasurer will monitor financial matters of the charity and report to the Board of Trustees regarding the financial health of the organisation.

As one of the Trustees, they are responsible for the overall governance and strategic direction of the charity, developing the organisation's aims, objectives and goals in accordance with the governing document, legal and regulatory guidelines.

Specific Responsibilities

- Work closely with the Finance Manager oversee the finances of the charity
- Chair the Finance sub-committee.
- Guide and advise the Board regarding budget settings, management accounts and financial statements, within the relevant financial policy framework
- Keep the Board informed about its financial duties and responsibilities.
- Advise on the financial implications of the organisation's strategic plans and key assumptions included in operational plans and annual budget
- Ensure that the financial resources of the organisation meet its present and future needs and that there is appropriate reserves policy
- Ensure key financial internal controls are in place to provide assurance to the Board that the charity's financial integrity is sound.
- Ensure that the accounts are prepared and disclosed in the form required by funders and the relevant statutory bodies, that they are properly audited and accepted recommendations of the auditors are implemented.
- Board level liaison with the external auditors.

The Role

Trustee Responsibilities

- Ensuring that the organisation pursues its stated objects (purposes), as defined in its governing document, by developing and agreeing a long-term strategy
- Ensuring that the organisation complies with its governing document (ie its trust deed, constitution or memorandum and articles of association), charity law, company law and any other relevant legislation or regulations
- Ensuring that the organisation applies its resources exclusively in pursuance of its charitable objects (ie the charity must not spend money on activities that are not included in its own objects, however worthwhile or charitable those activities are) for the benefit of the public
- Ensuring that the organisation defines its goals and evaluates performance against agreed targets
- Safeguarding the good name and values of the organisation
- Ensuring the effective and efficient administration of the organisation, including having appropriate policies and procedures in place
- Ensuring the financial stability of the organisation
- Protecting and managing the property of the charity and ensuring the proper investment of the charity's funds
- Following proper and formal arrangements for the appointment, supervision, support, appraisal of the chief executive.

Qualifications

- Professional Accountancy Qualification (ACA, ACCA, CIMA or CIPFA)

The Role

Skills

- Excellent communication skills, including active listening skills
- Ability to work effectively as part of a team
- Strategic vision
- Good, independent judgement
- Ability to analyse information effectively and challenge appropriately
- Chairing meetings
- Working as a finance professional, including managing complex accounts
- Charity accounting (desirable)
- Liaising with external investment managers.

Knowledge

- Understanding of the Charities Statement of Recommended Practice (SORP)
- Understanding of Investment policies and practice
- Understanding of the legal duties, responsibilities and liabilities of Trustees.

How to Apply

If you would like to apply for this role please email your CV to:
hr@ageukbang.org.uk

Any other questions about the role or organisation please email:
hr@ageukbandg.org.uk



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Age UK Bromley & Greenwich is a trading name of Age Concern Bromley, registered charity no 1060861 and company limited by guarantee registered in England and Wales no. 3304510