

Role Description

Post Title	Trustee, Treasurer
Place of Work	Dartington/Hybrid
Hours	A minimum of 5 meetings a year plus any further sub-committee group meetings as necessary
Salary	Unpaid (expenses incurred while travelling to meetings)
Main Purpose of Job	
To oversee the effective and responsible management of a charity. This involves ensuring the charity operates in accordance with its charitable purpose and best interests of its beneficiaries, complies with relevant laws and regulations, and safeguards the charity's assets.	
Treasurer Responsibilities	
The lead trustee for finance (the Treasurer) has a specific set of duties relating to finance, in addition to their wider responsibilities as a trustee. Strategic: - Consider the charity's strategic plans and ensure they reflect sound financial management practices, statutory accounting guidance, appropriate internal controls, and financial governance expectations. - Lead the Finance Subcommittee to make informed financial decisions that support the charity's goals and long-term operational viability. - Ensure robust financial due diligence checks are completed to support board decisions. - Work with the Charity Management Team (CMT) to assess financial risks, funding streams and cost-effectiveness across service areas. - Monitor the charity's risk register to ensure it accurately reflects financial risks, reserves requirements, and appropriate mitigation measures, such as adequate Trustee Liability insurance coverage. - Work with CMT to ensure financial readiness for regulatory visits/inspections (such as CQC and Ofsted). Effective policy and practice: - Work with the CEO and Central Support Services to ensure suitable financial systems, internal controls, and financial policies are in place in line with legal requirements and Charity Commission guidelines. - Support Central Support Services with bank checks where necessary. - Support with annual external financial audits as required. - Translate complex financial information into clear, understandable information, for non-financial trustees. - Present financial reports and advice for board meetings, providing commentary to advise the board on key financial matters. - Present financial updates confidently to the board and annual general meetings as required. - Work with the CMT with the setting, reviewing, and monitoring of annual budgets. Creating the right culture: - Champion financial transparency and accountability throughout the charity. - Attend relevant financial governance training to stay updated. - Support fellow trustees in developing their individual and collective understanding of charity finances and financial reporting. - Engage with staff, volunteers and other stakeholders where needed, to understand operations. - Support the board in evaluating the charity's financial health, structure and resource allocation to	

maximise impact for beneficiaries.

General Trustee Responsibilities

- Ensure the charity complies with its governing document (its Articles of Association), charity law, company law and any other relevant legislation or regulations.
- Ensure the charity pursues its objectives as defined in its governing document.
- Ensure the charity applies its resources exclusively in pursuance of its objectives. For example, it must not spend money on activities which are not included in the objectives, however worthwhile they may be.
- Contribute actively to the board of trustees by giving firm strategic direction to Lifeworks, setting overall policy, defining goals, setting targets, and evaluating performance against agreed targets.
- Safeguard the good name and values of the charity.
- Ensure the financial stability of the charity.
- Use any specific skills, knowledge or experience you have to help the board of trustees reach sound decisions. This may involve leading discussions, identifying key issues, providing advice and guidance on new initiatives, and evaluating or offering advice on other areas in which the trustee has particular expertise.
- Attend all board meetings.
- Join additional sub-committees where appropriate.

PERSON SPECIFICATION

Please ensure that you read the person specification carefully, as this will be used to assess candidates as part of the shortlist and interview process.

Criteria	Essential/ Desirable
Knowledge/Qualifications	
A professional qualification and/or equivalent senior financial management experience.	E
Experience in financial oversight, budgeting, and financial reporting, preferably within the charity or non-profit sector.	E
Knowledge of charity accounting standards (Charities SORP), UK financial regulations, and Charity Commission governance frameworks.	E
Familiarity with funding models in health, social care, or special education sectors (e.g., CQC/Ofsted environments).	D
Skills	
A commitment to the organisation.	E
A willingness to devote the necessary time and effort.	E
Strategic vision.	E
Good, independent judgement.	E
An ability to think creatively.	E
An understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship.	E
Good communication skills.	E
An ability to work effectively as a member of a team.	E