

Charity Treasurer & Trustee

To fully support and engage with Age Well East activities, including social media, policies, procedures and fund raising activities.

Whilst there is no remuneration for this role, we will pay essential expenses.

This post will work closely with the Charity Chair of Trustees, Audit, Risk & Governance board Sub-committee Members, the Finance Manager and the CEO of our organisation.

The Trustees are collectively responsible for the Charity.

Age Well East is a values-driven organisation with a passion for making the greatest difference to people by supporting and empowering them to live happier and healthier lives.

Our Vision

To be the go-to place for people to feel connected, informed and included as they grow older.

Our Values

- Trust
- Excellence
- Community

We have gone through significant growth since 2017 and provide a wide range of high-quality services across Essex. Each year we support thousands of people through advice and information; befriending; emotional support services; and friendship groups and activities. Our long-term ambition is to continue to grow so that we can make a difference to lives of people across Essex by continuing to develop our services and look for new areas of innovation.

We are growing our reach and activity because of the high demand for support. It is an exciting time to be a part of what we are doing, and this opportunity is about genuinely making a big difference to people. We take great pride in what we do, who we help and how we transform lives.

Statutory Requirements & Duties

To work in the best interests of Age Well East (AWE), ensuring that AWE uses its resources exclusively in pursuance of our objects:

“to promote the following purposes for the benefit of the public and/or older people in and around the Counties of Suffolk and Essex (“the area of benefit”): 1. preventing or relieving the poverty of the public and/or older people; 2. advancing education; 3. preventing or relieving sickness, disease or suffering of the public and/or older people (whether emotional, mental or physical); 4. promoting equality and diversity; 5. promoting the human rights of the public and/or older people in accordance with the universal declaration of human rights; 6. assisting the public and/or older people in need by reason of ill-health, disability, financial hardship, social exclusion or other disadvantage; and 7. such other charitable purposes for the benefit of the public and/or older people as the Trustees may from time to time decide; the outcome of this being the promotion of the well-being of the public and/or older people.”

- To ensure that AWE complies with all relevant governance documents, charity and company law and any other relevant legislation and regulation.
- To contribute actively to the Board of Trustees' role in giving firm strategic direction to the organisation; setting overall policy, defining goals, approving targets and approving budgets.
- Ensuring AWE's performance is evaluated against those agreed targets.
- To safeguard the reputation of AWE.
- To ensure the effective and efficient administration of AWE.
- To protect and manage the property of the charity and to ensure the proper investment of the charity's funds.
- To appoint the Chief Executive (CEO) and monitor their performance.
- Where appropriate, serve on subcommittees of the board.
- From time to time, represent AWE at external meetings with potential funders, influencers, beneficiaries and supporters and to attend events and functions.

Duties as Treasurer

The Treasurer provides support and advice to the Finance Manager and CEO, and provides expert financial advice to the Board. The specific responsibilities are to:

- Support the Board in performing its duty to ensure proper accounting records are kept, financial resources are controlled and spent in-line with governance, legal and regulatory requirements.
- Ensure that annual accounts are submitted to all relevant regulators in a timely fashion.
- Chair the Finance, Audit, Risk & Governance sub-committee (FARG) in line with its terms of reference, reporting findings/developments back to the Board.
- Keep the board regularly informed of the free reserves position and give advice regarding adaptations according to circumstances.
- Board level liaison with external auditors on specific issues in the auditing process and related board representations.
- Guide and support Trustees to formally approve the annual report and audited accounts.
- Explain technicalities of accounts in plain language which is fully understood by the Trustees.
- Ensuring that AWE's finances are responsibly managed and where applicable invested, for the betterment of the organisation's work and the beneficiaries it serves.
- Ensure the charity's financial reserves, cost management and investment policies are efficient and effective.
- Ensure all strategic plans are financially appraised and budgets are aligned to meet objectives.
- Ensure the executive's risk-management process is fit for purpose and consequently report on strategic risk to the Board of Trustees at regular intervals.

Person Specification

Essential:

- Qualified accountant with demonstrated commercial awareness and knowledge.
- Proven ability to communicate and explain financial information to members of a Board and other stakeholders.
- Analytical and evaluation skills, demonstrating good judgement.
- Understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship.
- Good communication and leadership skills.
- Experience and knowledge of commercial or charity risk management.

Time Commitment:

- You will Chair the FARG sub-committee.
- The Board meets 4 times a year and the Treasurer is expected to be available an additional 4 times a year for the subcommittee.

Location

Most trustee meetings are online, in the early evening and take approximately two hours. The treasurer will be expected to visit AWE's office for a half day in Colchester, Essex once a year.