



We're really pleased you might be interested in volunteering with us. We know people's time is very limited. Or that there might be support you need to carry out this role. We are open to conversation about this and we want to be as flexible as we can. Please get in touch if you want to talk about the role.

Trustee: Treasurer Role Description

Purpose of the role of a trustee is: to ensure the charity is carrying out its purpose. Complying with the charity's governing document and the law. Acting in the charity's best interest and managing the charity's resources responsibly. This is an important role which will allow our group to take root as we become a registered charity and to support other groups in Exmouth, as we work together to address climate change. **The Treasurer's role specifically:** ensures proper records are kept and that effective financial procedures are in place. Monitors and reports to the rest of the Trustees on the financial health of the organisation. Working with other trustees in the production of necessary financial reports and statutory returns. Take responsibility for finance policy and reviewing and updating this annually.

What does this involve:

- Ensure proper records are kept of our financial transactions and have effective financial procedures and controls are in place,
- Liaise with relevant trustees and/or volunteers to ensure the financial viability of the organisation.
- Make fellow trustees aware of their financial obligations and take a lead in interpreting financial data to them.
- Regularly report the financial position at trustee meetings (balance sheet, cash flow, fundraising performance etc).
- Oversee the production of an annual budget and report of the previous financial year at an annual AGM.
- Appraising the financial viability of plans, proposals and funding applications.
- Lead on appointing and liaising with auditors/an independent examiner

Skills or attributes you will need:

Knowledge of basic bookkeeping / financial record keeping

Good financial analysis skills and able to prepare a budget

Good IT skills

Good communication skills

Enjoys being part of a team, collective decision making, be flexible and non judgemental

What you might gain:

A greater knowledge about your local community

Knowledge of finance and fundraising practices within the charity sector

Knowledge of charity sector governance and structures

Understanding of management and community development

Experience and skills that you can detail on application forms or CVs

Who will supervise me / who do I go to if I have a problem:

You'll be working as part of a group of Trustees and it is the Chairperson's role to support and supervise Trustees.

Time commitment:

We estimate between 1-3 hours a week, this will vary at different times of the year. There are trustee meetings which take place roughly every 6 weeks for 2 hours. From time to time a finance sub committee may be required to focus on something specific. We are flexible about when you volunteer but we really appreciate you being honest and letting us know if your circumstances are changing.

Location:

We don't have a base at the moment. We meet at each other's houses or in public spaces or on zoom. We know that many people volunteer to have contact with people or for other personal or professional reasons. Please make us aware of why you would like to volunteer so we can make sure the role will suit your needs.

Volunteer expenses:

We do not currently have a budget for this although we will be seeking funding to cover travel and other expenses. We are committed to reducing barriers to volunteering. If you would like help with travel please let us know.

Interested in this role? Please contact us by email transitionexmouth@gmail.com

What happens next:

We will invite you to meet us and have a conversation about the role. You can ask us your questions about the role and the charity. This isn't a formal conversation, it's just a way to make sure the role will work for both yourself and the organisation too.