

Treasurer role description



About the role

Do you have financial experience and a passion for using your skills to help improve the lives of older people? Join our Board of Trustees!

Care Rights UK is a longstanding charity, providing support to older people needing care for over 30 years. With a healthy balance sheet, we are in an exciting phase of investing in growth, seeking to diversify and increase our reach across the UK. We are seeking a new Treasurer to oversee our strategic spending plan, monitor our investment portfolio and advise the Board on fulfilling their financial responsibilities. You would play a vital role in financial oversight, supporting our well-established Board of Trustees and our small, friendly team of staff led by our experienced Director.

We are a small charity punching above our weight. Providing the national advice line for older people needing care and campaigning for a better care system, we are a leading voice in the sector, championing the rights of older people.

The ideal candidate will be a positive, can-do person, with a drive for using their financial experience to help promote the rights of older people.

We value equality and diversity. We welcome applications from everyone regardless of age, gender, ethnicity, sexual orientation, faith, disability, or carer status.

Message from Chair

"Care Rights UK is building on its lengthy experience as a champion of the rights of older people needing care. Now is an exciting time to join us as we are modernising our services and investing in our staff team to enable us to increase our reach across the UK. As Treasurer you will play a leading role in ensuring that our growth is built on sound finances that will support the vital service that we provide. I look forward to hearing from you."

Trish Davies, Chair of Care Rights UK

Role description

The duties of a Treasurer of Care Rights UK include:

- Overseeing, approving and presenting budgets, accounts and financial statements
- Ensuring the financial resources of the organisation meet its present and future needs and resources are applied exclusively in pursuance of the charitable objects
- Ensuring that the charity has an appropriate reserves policy and investment policy
- Protecting the charity's legacy capital whilst ensuring we meet our obligations to spend it responsibly in pursuance of our objectives
- Preparing and presenting financial reports to the Board and keeping the Board informed about its financial duties and responsibilities
- Ensuring that appropriate accounting procedures and controls are in place
- Liaising with staff about financial matters

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Care Rights UK is a registered charity in England (1020194) and a company limited by guarantee (2813362)

- Advising on the financial implications of the organisation's strategic plans
- Maintaining a relationship with and oversight of the investment managers running our portfolio and monitoring performance and dividend payments
- Monitoring the organisation's investment activity, ensuring there is no reputational risk or conflict between investments and the aims and objects of the charity
- Ensuring that the accounts are prepared, scrutinised and disclosed in the form required by funders and the relevant statutory bodies (such as the Charity Commission and the Companies House)
- Contributing to the fundraising strategy of the organisation
- Making a formal presentation of the accounts at the annual general meeting

In addition, the duties of a Trustee of Care Rights UK include:

- Ensuring that the charity pursues its stated objects, as defined in its Memorandum & Articles, by keeping under review the Strategic Plan
- Ensuring that the charity complies with its Memorandum & Articles, charity law, company law and any other relevant legislation or regulations
- Ensuring Care Rights UK defines its goals and evaluates performance against agreed targets
- Safeguarding the good name and values of Care Rights UK
- Ensuring the effective and efficient administration of the charity, including having appropriate policies and procedures in place
- Following proper and formal arrangements for the appointment, supervision, support, appraisal and remuneration of the director
- Using any skills, knowledge or experience to help the Board of Trustees to reach sound decisions, including scrutinising Board papers, leading and contributing to discussions, providing advice and guidance on new initiatives, or other issues in which the trustee has special expertise

Person specification

We would expect candidates to explain in their application how they meet most of the criteria listed below:

- Financial qualifications and experience
- Some experience of charity finance, fundraising and pension schemes
- Ability to analyse proposals and examine their financial consequences
- Being prepared to make unpopular recommendations to the Board and a willingness to speak your mind
- A willingness to be available to staff for advice and enquiries on an ad hoc basis
- Strategic vision
- Good, independent judgement
- Ability to think creatively
- Understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship
- Ability to work effectively as a member of a team
- Commitment to Care Rights UK, its values and Nolan's seven principles of public life (selflessness, integrity, objectivity, accountability, openness, honesty and leadership)

Expectations

- Attendance and active participation in meetings of the Board of Trustees (4-6 per year)
- Active participation in occasional, ad hoc Board-level decisions over email between meetings
- Membership of the Audit & Risk Committee and the Human Resources & Remuneration Committee and active participation in meetings/ad hoc decisions over email
- Any potential conflicts of interest should be declared on application

More information

For information about our current trustees and our staff team, see the Care Rights UK [website](#).

Information about our three-year strategic plan is also on our [website](#).

For an informal discussion with our chair or one of our current trustees, please contact us at team@carerightsuk.org

To apply

To apply, please write a cover letter to our chair, Trish Davies, explaining why you are interested in becoming the Treasurer and how you meet the criteria set out in the person specification. Letters should be no longer than 3 pages. Applicants should also submit a CV. Please send applications to team@carerightsuk.org **by 9am on 1 April. Applications will be reviewed on a rolling basis**, with shortlisted applicants being invited for interview (in person or via video conference). **If we find a suitable candidate, we will close applications early, so we therefore urge interested applicants to apply as soon as possible.**

Message from Director

“Leading the small, dedicated, friendly team of staff and volunteers is a real privilege. As we invest to grow our services and increase our reach across the UK, now is an exciting time to join the Board. We look forward to welcoming our new Treasurer.”

Helen Wildbore, Director of Care Rights UK

About Care Rights UK

Our vision

The best quality of life for older people needing care

Our purpose

Care Rights UK is your care champion, the charity focused on promoting the rights of older people in care.

We want people to know their rights and how to use them. We offer information, advice and support to empower people using care services and the relatives and friends who help them.

As a community of families and experts, we fight for better lives for people in care. We identify poor care and highlight good practice, and demand a better care system.

Our values

Well-informed

We value knowledge, particularly from people's every day experiences of care and support services. We are trusted for our expertise on care and rights, and for our integrity.

Independent

We're proud of our independence. It gives us the freedom to speak out, adapt to changing circumstances and work with others to make care services better.

Courageous

We fight for change where it's needed so that people who need care and support have their rights respected.

Empowering

We value each other and are more powerful together. We listen and we support one another. Our community makes us stronger.