Serve On: Volunteer Finance Lead

Remote / Flexible | Volunteer Role | Trustee-level position

The Role

We are seeking an experienced **Volunteer Finance Lead** to own and manage the complete financial function of Serve On. This is a strategic leadership role that combines hands-on financial management with oversight responsibility. You will ensure accurate record-keeping, compliance, and financial planning while acting as a trusted advisor to our Board of Trustees.

This role is ideal for someone with bookkeeping, accounting, or finance experience who wants to lead a complete finance function for a meaningful humanitarian organisation, combining operational excellence with strategic input.

Time Commitment: Approximately 6–12 hours per month on average (typically 8–10 hours), worked flexibly. Time varies by activity: regular month's average 4–8 hours; month-end reporting adds 2–3 hours; year-end close adds 8-12 hours over 6 weeks; international deployments (2–3 weeks/year) may spike to 3-4 hours/week.

About Serve On

Serve On is an international search and rescue and disaster response charity that deploys skilled volunteers to support communities affected by crises around the world. We rely on strong governance, sound financial management and dedicated volunteers to ensure every donation has maximum impact.

Key Responsibilities

Financial Management & Record-Keeping

- Own the charity's accounting function: weekly transaction entries, bank reconciliation, expense processing, and invoice management using Xero or similar accounting software
- Prepare and present monthly management accounts to the Board: cashflow summary, bank reconciliation, P&L statement, and restricted funds schedule
- Oversee cashflow forecasting and budget monitoring
- Manage donation reconciliation and Gift Aid administration (quarterly or bi-annual claims)

- Manage donation and membership fee records, accessing and downloading from various platforms (CAF Donate, Wonderful, Enthuse)
- Maintain membership, donor and trustee records
- Ensure the charity asset register is accurate and current
- Prepare quarterly VAT reviews and submission to HMRC (No VATable activities are currently being carried out by the charity and therefore returns in the near future may be nil)

Payment Control & Authorisation

- Prepare payment runs for dual-authorisation (you initiate; an independent Trustee approves and submits to bank)
- Ensure payment controls are robust and prevent unauthorised spending
- Manage the finance email inbox and respond to routine queries
- Track payment status and ensure timely settlement of approved invoices
- Manage the charity's four bank accounts and PayPal account and the transfer of Restricted funds when appropriate

Governance & Compliance

- Own responsibility for The Charity Commission and Companies House compliance, including annual filing deadlines
- Lead preparation of annual statutory accounts for external review/audit
- Review and contribute to financial policies and procedures
- Monitor restricted funds to ensure donor compliance and reporting obligations are met
- Maintain financial controls and audit-ready documentation
- Maintain and oversee the charity asset register and trustee records
- Review and update financial policies as needed

Insurance & Risk Management

- Monitor annual insurance renewals (D&O, Travel and Accident, Vehicle, Commercial and Public Liability, etc.) and ensure appropriate cover
- Ensure insurers are notified of international deployments and that cover remains appropriate
- Review renewals annually and report changes in cover or cost to the Board
- Maintain records of all insurance policies and renewal dates

Strategic Support & Advice

- Provide financial insight and strategic advice to Trustees on sustainability, planning, and performance
- Help improve financial systems and processes
- Support the charity's long-term financial planning and sustainability strategy

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Skills & Experience

Essential:

- Hands-on experience with Xero or a similar cloud-based accounting package (ideally Xero). This is a hard requirement—monthly reporting and compliance demands require prior accounting system expertise.
- Experience in bookkeeping, accounting, finance, treasury or business administration
- Strong attention to detail and organisational skills
- Confidence with spreadsheets and financial systems
- Organised and detail-oriented

Desirable:

- Understanding of charity finance, VAT, Gift Aid, or fundraising compliance
- Experience with financial reporting and management accounts
- Understanding of charity governance and trustee responsibilities
- Previous bookkeeping, finance administration, or charity finance experience

Personal qualities:

- Reliable and independent
- A commitment to the mission and values of Serve On

Time Commitment Breakdown

- **Regular month:** 4–8 hours (daily accounting entry, weekly reconciliation, routine admin, mid-month reporting and Board preparation)
- **Month-end reporting:** +2–3 additional hours to finalise monthly accounts for Board review
- **Year-end close:** +6–10 additional hours over 6-week period for annual accounts preparation
- **Deployment periods:** May increase to 3-4 hours/week during international deployments (typically 2–3 weeks per year) due to compliance reporting spikes and operational finance support needed for deployed staff
- **Insurance renewal periods and situation-related queries:** +10-20 additional hours over the year.

Flexibility built in: If deployment availability is an issue, discuss this upfront. We can work around your circumstances and can provide support during deployment peaks if needed.

Payment Authorisation Workflow

1. **You (Finance Lead):** Prepare payment run in Xero (codes invoices, totals)
2. **Independent Trustee:** Reviews and approves payment run

3. **Independent Trustee:** Submits to bank and dual-authorises payment
4. **You:** Records payment confirmation and updates payee records

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Why Volunteer with Serve On?

- Lead the complete financial function of a meaningful humanitarian organisation
- Influence the Board's financial strategy and long-term sustainability at a trustee level
- Gain valuable charity sector, governance and compliance experience
- Work with a passionate and dedicated volunteer team
- Help ensure every donation has maximum impact
- Flexible, remote volunteering opportunity with scheduling around your availability

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What We Offer

- Full access to the Board of Trustees and monthly financial review meetings
- Clear escalation path to Chair and Finance Committee for policy decisions
- A well-defined role with documented processes and procedures
- Support and mentoring from experienced trustees
- If you're new to Xero but strong on accounting skills, we offer structured 3-week onboarding with administrative guidance

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How to Apply

If this role appeals to you, please get in touch with details of your finance and accounting experience, and your Xero (or similar software) expertise. Let us know your availability and any constraints around deployment periods. Contact us via www.charity.co.uk