

TREASURER – ROLE DESCRIPTION

Welcome to the founding stage of believe-IN Educational Services for Change and Growth in Adulthood, SCIO! We are in the process of establishing a passionate and dedicated charity organisation with a mission to inspire humanity through education for change and growth, in adulthood. Our vision is to create a world where everyone believes in themselves and can make the life they wish and deserve happen, guided by the principles of self-efficacy. We are actively seeking individuals interested in becoming Trustees to help shape the future of believe-IN and contribute to the establishment and development of our organisation.

You will work closely to believe-IN's Founder to make their vision happen. As a trustee in this stage, you would be instrumental in the legal creation of the charity and have a significant role in implementing its vision, mission, and values, as well as its strategic direction. Your passion and expertise will be crucial in laying the grounds for believe-IN's success.

About believe-IN

At believe-IN, we aspire to serve as the facilitators of change for individuals and organisations in transitions. Our mission is to provide lifelong educational services that empower adults to manage life changes and transitions effectively, fostering growth and preventing psychological declines (that directly impact mental health and wellbeing). We operate with a humanistic approach, nurturing people and organisations based on the principles of human potential. Our values of Knowledge, Education, Leadership, Integrity, and Courage guide us in our pursuit of creating exceptional life outcomes for all.

We have an exciting and novel *one-stop-shop concept* that offers a variety of educational and training programs, activities, and initiatives designed to help individuals develop essential life skills, and improve their personal development, and enhance their overall well-being during critical life changes.

Our Social impact

At believe-IN we take inspiration from the principles of lifespan developmental psychology and human rights. We understand the unique journey of adulthood and believe that individuals, regardless of their backgrounds, can flourish when equipped with essential life skills and personal development opportunities. Our commitment to providing a holistic and inclusive platform stems from the belief that every person, connected through the thread of humanity, can lead a more fulfilling life. We aspire to create a brighter, more empowered future, one where personal growth, skill development, and well-being are accessible to all, fostering a more harmonious and equitable society for everyone.

believe-IN is dedicated to creating a meaningful and far-reaching social impact by focusing on several key principles:

1. **Life Skills for Managing Life Changes and Transitions:** Our core mission revolves around equipping individuals with the life skills needed to manage life changes and transitions successfully. We recognise that these critical moments can have a profound impact on mental health and overall well-being. By providing evidence-based education and support, we aim to prevent the decline of mental health and foster a sense of well-being within our community.
2. **Improved Well-Being and Mental Health:** The community at large benefits from our proactive approach to life skills education. Our emphasis on effective communication, goal setting, feeling and thinking, and self-improvement empowers individuals to navigate life's challenges with resilience and confidence. As a result, we contribute to an improved sense of well-being and mental health within our community. By addressing these key aspects of life, we pave the way for better life outcomes and a more harmonious society.
3. **Inclusivity and Non-Discrimination:** We are resolute in our commitment to inclusivity, ensuring that the benefits of our programs and services are accessible to all individuals in adulthood, without any form of distinction or bias. We believe in upholding the principles outlined in the Declaration of Human Rights, acknowledging that every person, regardless of their race, colour, sex, language, religion, political opinion, national origin, or any other status, deserves equal access to personal development and well-being resources.

The Trustee role

Trustees are key decision-makers, responsible for supporting the organisation's direction, values, and governance structure. Your dedication and leadership will be essential in shaping believe-IN's future.

As well as fulfilling the duties of a Trustee, the Treasurer maintains an overview of [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's financial affairs. The Treasurer ensures that effective and appropriate financial measures, controls and procedures are put in place and reports to the Board at regular intervals about the financial health of the organisation.

Treasurer role

- Overseeing the presentation of budgets, internal management accounts and annual financial statements to the Board of Trustees.
- Ensuring that proper accounting records are kept, and that appropriate accounting procedures and controls are in place.
- Ensuring that robust and comprehensive financial policies are in place and being implemented, and supporting the development of policies covering financial reserves, and cost management.
- Monitoring and advising on the financial viability of the charity.
- Overseeing financial controls and adherence to systems, regularly liaising with Chief Executive.
- Advising on the financial implications of the charity's strategic plan, including overseeing the charity's financial risk-management process
- Ensuring investments and assets are maximised.
- Lead on the appointment of and liaison with external auditors.
- Oversee the development and implementation of systems for appraising, mitigating and reporting corporate risk.
- Ensuring that the accounts are prepared and disclosed in the form required by relevant statutory bodies, for example, the Charity Commission and/or the Registrar of Companies.
- Keeping the board informed about its financial duties and responsibilities and liaising with the Chief Executive to develop the financial understanding of the Board of Trustees.

What we are looking for

- A finance professional. A knowledge of charity finance is an advantage. Otherwise an enthusiasm to learn, drawing from sound commercial experience and an understanding of SMEs.
- A strategic thinker with an ability to balance risk and opportunity.
- Clear communicator with the ability to bring the financial information alive to non-finance specialists.
- Willing to play an active role in areas such as forecasting, setting budgets, liaising with auditors

In addition to the above, the Treasurer will also have the responsibilities and qualities of all trustees:

Responsibilities of all trustees

- Support and provide advice on [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's vision, mission, strategic goals and activities.
- Approve financial strategies and policies, and monitor and evaluate their implementation.
- Oversee [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's financial plans and budgets and monitor and evaluate progress.
- Ensure the effective and efficient administration of the organisation.
- Ensure that key risks are being identified, monitored and controlled effectively.
- Review and approve [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's financial statements.
- Provide support and challenge to [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's chairperson in the exercise of their delegated authority and affairs.
- Keep abreast of changes in [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's operating environment.
- Contribute to regular reviews of [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's own governance.
- Attend Board meetings, adequately prepared to contribute to discussions.
- Use independent judgment, acting legally and in good faith to promote and protect [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's interests, to the exclusion of their own personal and/or any third party interests.
- Contribute to the broader promotion of [to be] believe-IN Educational Services for Change and Growth in Adulthood, SCIO's objects, aims and reputation by applying your skills, expertise, knowledge and contacts.

[As a small charity, there will be times when the trustees will need to be actively involved beyond Board meetings. This may involve scrutinising board papers, leading discussions, focusing on key issues, providing advice and guidance on new initiatives, presenting externally, or other issues in which the trustee has special expertise.]

Attributes and qualities

We are looking for people willing to bring energy, enthusiasm and commitment to the role, and who will broaden the diversity of thinking on our board.

[You need previous governance experience – as a newly formed SCIO we would benefit from prior knowledge.]

Personal skills and qualities

- Willingness and ability to understand and accept their responsibilities and liabilities as trustees and to act in the best interests of the organisation.
- Effective ability to think creatively and strategically, exercise good, independent judgement and work effectively as a board member.
- Effective communication skills and willingness to participate actively in discussions and brainstorming.
- A strong personal commitment to equity, diversity and inclusion.
- Enthusiasm for our vision and mission.
- Willingness to lead according to our values, Knowledge, Education, Leadership, Integrity, and Courage.
- Commitment to Nolan's seven principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership

Terms of appointment

Terms of office

- Trustees are appointed for a 3-year term of office, renewal for 1 further terms to a maximum of 1 year.
- This is a voluntary position, but reasonable expenses will be reimbursed, when approved in advanced.

Time Commitment (Estimated at 15 hours per month)

- Attending 4 Board meetings annually. Meetings are held remotely or in person.
- Monthly scheduled meeting with the chairperson with flexibility to respond swiftly to the occasional ad hoc issue.
- Attending annual strategy / training sessions.

Trustees have legal responsibilities under charity law.

More on these legal responsibilities can be found by following this link: <http://www.oscr.org.uk/media/1577/guidance-for-charity-trustees.pdf> the relevant information is on page 3.