



### **Trustee Role Description Treasurer**

Trustees are the people responsible for controlling the management and administration of Jigsaw, in accordance with the charity's constitution.

The role of a trustee is:

- To ensure that Jigsaw (Bury) complies at all times with its governing document, charity law, company law and any other relevant legislation or regulations
- To ensure that the charity pursues its objectives as defined in its governing document (e.g. the promotion of any charitable purpose for the benefit of the community in the Bury Metropolitan area)
- To maintain proper financial control and ensure that Jigsaw Bury applies its resources exclusively in pursuance of its objects, i.e. the charity must not spend money on activities that are not included in its objects, no matter how worthwhile or charitable those activities are
- To set and maintain vision, mission and values
- To develop strategy, set overall policy, define goals and set targets, and evaluate performance against agreed targets
- To ensure accountability
- To set up employment procedures and support the roles of staff/volunteers
- To support the operational management of the organisation
- To draw up and monitor the implementation of internal policies, which must include equality and diversity, health and safety, and grievance and disciplinary policies
- To ensure that risk assessments for all aspects of the business are carried out
- To safeguard the good name and values of Jigsaw Bury
- To maintain effective board performance and ensure the effective and efficient administration of the charity including funding, insurance and premises
- To promote the work of the charity
- To act in the best interests of Jigsaw Bury, never in the interests of themselves or another organisation

In addition to the above statutory duties, each trustee should use any specific skills, knowledge or experience s/he has to help the board reach sound decisions. These may involve scrutinising board and focus group papers, leading discussions, focusing on key issues, or providing advice and guidance on new initiatives and other issues in which the trustee has special expertise.

A trustee is required to act reasonably and prudently in all matters relating to the charity and must always bear the interests of Jigsaw in mind.

Some people are disqualified by law from acting as trustees, including anyone described in sections 178 to 180 of the Charities Act 2011. This includes:

- anyone who has an unspent conviction for an offence involving deception or dishonesty

- anyone who is an undischarged bankrupt
- anyone who has been removed from trusteeship of a charity by the Court or the commission for misconduct or mismanagement
- anyone under a disqualification order under the Company Directors Disqualification Act 1986
- anyone who has entered into a composition or arrangement with their creditors which includes an individual voluntary arrangement (IVA), and is currently on the Insolvency Service Register

It is normally an offence to act as a trustee while disqualified unless the commission has given a waiver under section 181 of the Charities Act 2011

### **Treasurer Role Description**

The treasurer's role comprises dealing with all of the charity's financial matters and upholding good practice. The treasurer will be required to report to the trustees each month, informing them of the current state of the organisation's finances.

It should be noted that while the treasurer will oversee the financial works of the charity the board as a whole will be held accountable for the charity's overall financial state.

#### *Summary of Responsibilities:*

- To oversee and present accounts and financial statements to the board of trustees.
- To ensure that proper accounts and records are kept.
- Where necessary, to produce and implement new financial control policies.
- To discuss individual financial matters with the appropriate staff member when required.
- To communicate with the charity's independent examiners.
- To monitor and advise on the financial sustainability of the charity.
- To advise on the financial implications of strategic planning.
- To act as a counter-signatory on cheques or requests for funds.
- To contribute to the financial strategy of the organisation.