



Finance Lead Trustee - Role Description

Time Commitment: approximately 7-15 hours per month (6 board meetings, 2 development days and ad-hoc meetings as required per year)

The role of our Trustees is to ensure that the Balsam Centre is fulfilling its mission to help people lead healthy, happy lives, supporting our Executive Team and other Board colleagues as much as holding them to account. The Balsam Centre is proud to have an excellent reputation for the quality of our work, which is based on clear values and a special way of doing things. Our Trustees are stewards of our mission, reputation, quality, values and operating model.

We now have a vacancy for a Trustee to lead on Finance.

Core Responsibilities

- Bring an understanding of the transformational nature of money to the work of the Board, helping the Board to understand the bridge that finance provides between our vision and the daily activity of the charity.
- Provide leadership, insights, support, and accountability opportunities to our executive team in fulfilling our mission.
- Ensure that all statutory responsibilities such as timely submission of annual accounts, are fulfilled.
- Ensure that the Balsam Centre is effectively pursuing its charitable objectives appropriate to our resources to remain viable, both in-year and over a three-to-five-year period.
- Provide mentoring and career development advice to our finance lead within the executive team and offer professional advice on specific issues as necessary.
- Ensure that the Balsam Centre remains financially and culturally healthy, and that we are compliant with charity law, company law, and any other relevant legislation or regulations, protecting and enhancing our reputation through good governance and personal conduct alike.

- Contribute to important Board discussions and wider Board dynamic, appreciating that the Balsam Centre is a multidisciplinary organisation full of people with different experiences and insights.
- Assist the Board and executive team in horizon scanning, anticipating and fielding risks as much as opportunities, bringing the outside world in and always relating back to our purpose- to serve the people in our neighbourhood.

Person Specification

You should have significant experience of finance and its transformational power. This may have been gained in an entrepreneurial, social enterprise, commercial, corporate, philanthropic or public sector environment. Your understanding of finance should be broad and innovative. We will be looking to you to push the boundaries of how we use money to turn our vision into reality.

Level of seniority is less important than ethos, energy and commitment to changing lives, but it is likely that you will have worked at a senior level in one context or another.

You will hold a professional accountancy qualification.

Aside from professional competencies, we are looking for values-driven people with high levels of emotional intelligence, who can lend not only their individual skills but help encourage those around them. Prior experience of sitting on a charity Board is not essential and we encourage first-timers as much as experienced Trustees, though it will be essential to demonstrate your understanding of the role of a charity Board Member and where governance responsibilities lie.

Most importantly, we are looking for Trustees who share and want to be actively engaged in our mission to help everyone lead a healthy, happy life.

You may well be someone who already knows and values the work of the Balsam Centre. If you are not already familiar with our work, we offer an orientation day in which you will see our ethos in action.