

Finance Trustee Role Descriptor

Purpose of the Role

The Finance Trustee (also known as Treasurer) provides strategic oversight and leadership on financial governance for Youth Connect South West (YCSW). Working as part of the Board of Trustees, the Finance Trustee helps ensure the organisation is financially sustainable, compliant with legal and regulatory requirements, and able to deliver its charitable purpose over the short, medium and long term.

Working alongside the Head of Finance to ensure challenge and rigour in YCSW financial planning and processes. The role will also require work with the Chair, Chief Executive Officer (CEO), and fellow trustees. The Finance Trustee plays a key role in providing financial oversight and assurance.

The role does not involve day-to-day financial management. Instead, it focuses on assurance, oversight, constructive challenge and strategic financial insight, supporting the Head of Finance, the Board and the Chief Executive Officer (CEO).

About Youth Connect South West

Vision

Inspiring young people.

We aim to inspire young people, and we are inspired by them. Their ideas, strengths and experiences drive what we do.

Mission

Creating opportunities with young people so they can be safe, be heard, belong and grow.

We work alongside young people, creating the space for change while recognising that the change belongs to them.

Values

Our values guide our culture, leadership and decision making:

- Inclusivity
- Collaboration
- Accountability
- Creativity
- Trustworthiness

The Finance Trustee is expected to actively live and promote these values through their contribution to Board leadership and decision making.

How the Role Operates at YCSW

At YCSW, the Finance Trustee role is defined by how financial leadership is exercised as much as what is done.

- Strategic: supporting the Board to make well informed decisions about sustainability, risk and investment in impact.
- Professionally informed: working with a senior finance professional in post, providing oversight and challenge rather than operational delivery.
- Assurance focused: providing confidence that appropriate financial controls, policies and reporting are in place.
- Collaborative: working constructively with the Chair, CEO and staff leads, without crossing into operational management.
- Values based: ensuring financial decisions reflect YCSW's mission, values and responsibilities to young people.

Key Responsibilities

Board Leadership and Governance

- Contribute actively to the effective governance of YCSW as a member of the Board of Trustees.

- Support the Board to meet its collective legal duties in relation to financial oversight, resources and accountability.
- Provide constructive challenge and professional insight on financial matters, while respecting the distinction between governance and operations.
- Support good governance practice, transparency and clear decision-making.

Financial Oversight and Assurance

- Provide appropriate professional challenge and scrutiny, recognising the presence of a senior finance function and maintaining clear boundaries between governance and operational responsibility.
- Provide Board level oversight of YCSW's financial position, sustainability and resilience.
- Support scrutiny of budgets, management accounts, cashflow forecasts and annual financial statements.
- Seek assurance that appropriate financial controls, systems and procedures are in place and operating effectively.
- Ensure the Board understands financial risks, assumptions and implications of key decisions.

Strategy and Sustainability

- Advise the Board on the financial implications of strategic plans, growth, partnerships and service delivery models.
- Support long term financial planning, including reserves, investment and risk management.
- Contribute to discussions about organisational sustainability and resilience in a changing funding environment.

Committees and Additional Responsibilities

- Chair and support the development of the Finance Sub Group.

- Support oversight of key financial policies, including reserves, investments and financial controls.
- Act as a point of reference for the Chair, CEO and Head of Finance on complex or high-risk financial matters.

Relationship with the Head of Finance

- Build a constructive and professional working relationship with the Head of Finance.
- The Head of Finance is the primary professional lead for financial management within YCSW.
- Provide support and challenge on financial planning, reporting and risk.
- Offer financial insight to inform strategic decisions, while avoiding involvement in operational financial management.

Time Commitment

The Finance Trustee role includes:

- Quarterly Board of Trustees meetings (approx. 3 hours per quarter plus preparation time).
- Attendance at Finance Subgroup (approx. 1 hour quarterly in preparation for Board meetings)
- Preparation and review of papers in advance of meetings.
- Occasional additional input on specific financial or strategic issues.

Induction and Development

YCSW is committed to ensuring trustees are well supported in their role. The Finance Trustee will receive a structured induction, including an introduction to YCSW's services, governance arrangements and finance function, and will be supported to access appropriate training and development relevant to their responsibilities as a trustee.

Other information

- Due to YCSW's work with children and young people, the role requires an enhanced DBS and reference check.
- YCSW will arrange and cover the cost of the DBS check.
- Trustees are entitled to reimbursement of reasonable travel and subsistence expenses, in line with YCSW's expenses policy.
- The role is unpaid.

Appointment and Recruitment

- YCSW is recruiting openly and nationally via its website and an online application form.
- Applicants complete a standard application form outlining motivation, experience, availability and alignment with YCSW's values.
- Shortlisted candidates are invited to a structured interview focused on governance, values and leadership approach.
- Interviews are two-way governance conversations, not job a interview.
- The successful candidate is appointed as a Trustee by the Board, in line with YCSW's Articles of Association.
- All appointments are subject to eligibility checks and a satisfactory DBS check.

Term of Office

Trustees are appointed for an initial term of three years, with the possibility of reappointment in line with the Articles.

Person Specification

Essential

Financial Governance and Insight

- Experience of senior financial oversight, finance leadership or strategic financial management.
- Ability to interpret financial information and explain it clearly to non-specialists.
- Understanding of financial governance, risk and accountability at Board level.

Strategic and Values Led Thinking

- Ability to think strategically about sustainability, risk and long-term impact.
- Strong alignment with YCSW's Vision, Mission and Values.
- Integrity, sound judgement and independence of thought.

Governance and Collaboration

- Confidence working alongside senior finance professionals and providing informed, independent challenge at Board level.
- Understanding of the distinction between trustee governance and operational management.
- Ability to work constructively with the Chair, CEO and fellow trustees.
- Willingness to provide appropriate challenge in a supportive and respectful way.

Safeguarding and Risk

- Commitment to safeguarding children and young people.

- Confidence engaging with organisational risk and assurance at Board level.

Time and Commitment

- Capacity to meet the time commitment required.
- Reliability and preparedness for meetings.

Desirable

- Experience within the voluntary, community or public sector.
- Understanding of charity finance, funding models or regulatory frameworks.
- Experience of serving on finance, audit or risk committees.