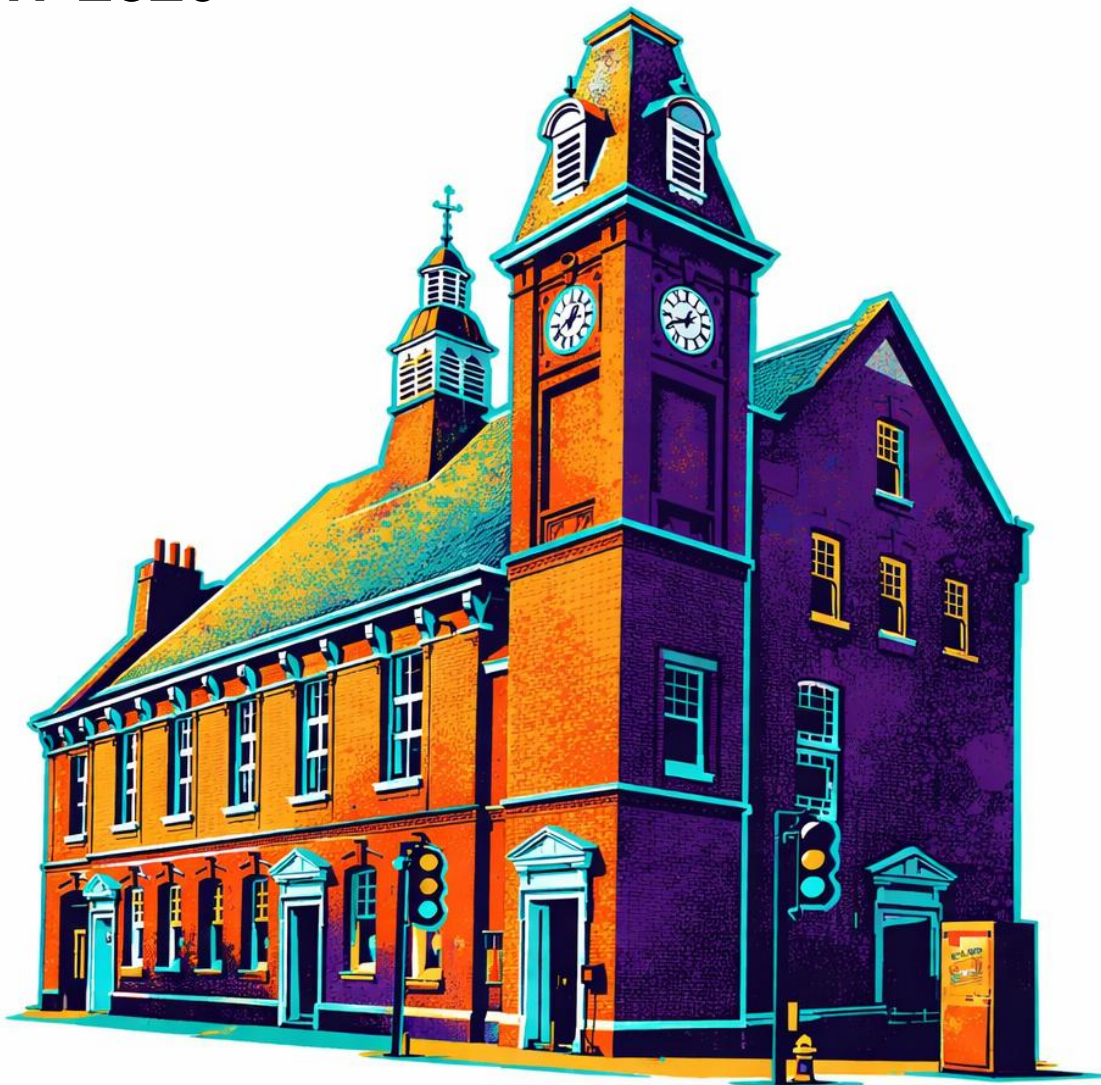


Treasurer

CANDIDATE INFORMATION PACK

MAY 2026





Welcome

Thank you for your interest in Merton Connected. You join us at a pivotal time in our journey. For over 30 years, Merton Connected has supported the voluntary, community, and faith sector across the borough. We unite local organisations, volunteers, public services, and businesses to help communities thrive and ensure local groups have the support they need to grow.

We are currently seeking a Treasurer to join our Board of Trustees to guide our next development stage. Our work focuses on fostering collaboration and building sector capacity. Through initiatives like Merton Giving and our volunteering services, we channel resources and support to where they are most needed. We are committed to strengthening organisations and partnerships so communities across Merton can flourish.

Driven by our vision of a connected, supported, and empowered borough, a new Treasurer is crucial to our mission. We look forward to your application.

JUDITH BRODIE
CHAIR, MERTON CONNECTED



About us

What we do

Merton Connected strengthens the voluntary, community and faith sector and supports residents across the borough. We provide advice, training and development that help organisations build strong governance, diversify income and plan for long-term sustainability. We promote volunteering across Merton, helping residents find meaningful opportunities to contribute while supporting organisations to recruit and develop volunteers.

We piloted social prescribing locally. The service has now been embedded across every GP practice in the borough for more than ten years, connecting residents with community activities and support that improve health and wellbeing.

We also deliver Healthwatch Merton and the Home Visits Library service, and lead Merton Giving, the borough's place-based giving scheme, which brings together donors and partners to support local organisations and communities.



Our strategy

You can find our new Strategy [here](#).

Our Vision is that Merton is recognised as a leading borough for resilience, inclusion, and community connection.

Our Mission: We support voluntary, community, faith and social enterprise organisations to grow, collaborate and thrive. Strengthening Merton's civil society and improving wellbeing for everyone who lives, works, studies or volunteers in the borough.

Our Values:

EMPOWERING

We support communities and organisations to build the confidence, skills and resources they need to thrive.

COLLABORATIVE

We bring people, organisations and partners together to share learning, build relationships and develop solutions to local challenges.

INCLUSIVE

We work to ensure all communities in Merton are heard, represented and able to take part in shaping the borough's future.

Recruiting a Treasurer



[Merton Connected](#) is governed by a [Board of Trustees](#) responsible for the organisation's strategic direction and oversight. The Board works closely with the Chief Executive and senior team to ensure the organisation remains well governed, financially sustainable and focused on delivering its charitable purpose. Merton Connected's turnover is around £1.5m pa, and our annual accounts can be found [here](#).

As we implement our [2025–2030 strategy](#) and continue to strengthen partnerships, programmes and impact across the borough, we are seeking a Treasurer to join the Board and support the next stage of our development. This includes ensuring that financial decisions are robust, well-informed and aligned with long-term priorities. The Treasurer plays a key role in overseeing the organisation's financial health and in helping the Board understand the implications of financial information for strategy, sustainability and risk. Working alongside fellow trustees and the leadership team, the Treasurer supports strong financial governance, effective financial planning and confident decision making.

Being a Trustee

What's involved?

Trustees are responsible for ensuring Merton Connected is well governed and delivering on its charitable purpose. The Board sets the organisation's strategic direction, oversees financial sustainability and ensures the organisation operates within its governing document and relevant legal and regulatory frameworks.

Trustees work collaboratively with the Chief Executive and senior leadership team, offering support, oversight and constructive challenge where needed. The Board considers a wide range of issues including strategy, finances, risk management, organisational development and major partnerships.

Trustees are expected to read board papers in advance, contribute to discussions and bring their professional experience to decision-making. Guidance on the duties of charity trustees can be found in the Charity Commission publication [The Essential Trustee \(CC3\)](#).

What you'll gain from the role

Becoming a trustee is a rewarding way to contribute to the voluntary sector and support communities locally.

Trusteeship offers the opportunity to use your professional skills in a different context, contribute to an organisation with a clear social purpose and gain valuable strategic experience.

Many trustees find the role provides opportunities for personal development, deeper insight into how charities operate and the chance to work alongside people with a wide range of skills and perspectives.

Treasurer Role Description

The treasurer leads oversight of the financial management of Merton Connected and supports the Board to understand the organisation's financial position, resilience and future outlook. The role includes reporting to the Board on financial health and risk, in line with best practice and legal requirements.

The Treasurer helps ensure the Board is well equipped to make informed financial decisions. They chair the Finance Committee in line with the scheme of delegated authority and report back to the Board.

In addition to the general responsibilities of a Trustee, the Treasurer's duties include:

Key responsibilities

Financial oversight

- Ensure that proper accounting records are kept, financial resources are properly controlled, invested and economically spent, in line with good governance, legal and regulatory requirements
- Ensure that the charity has appropriate financial policies including on reserves, investments and internal control, and reviews them at regular intervals
- Ensure that tax issues are well understood and that appropriate tax compliance is maintained
- Work with the CEO and team, including finance staff to ensure the charity has an effective finance function delivering the right information at the right time to the organisation and the Board
- Monitor the organisation's investment activity and ensuring it is consistent with the organisation's policies and legal responsibilities.

- Authorise payments in line with the scheme of delegated authority .

Annual Accounts and Reporting

- Ensure that the Annual Report of the Trustees and Financial Statements are prepared and disclosed in the form required by the Statement of Recommended Practice (SORP) and relevant legislation and guidance
- Ensure that the accounts are scrutinised in the manner required (independent examination or audit) and any recommendations are implemented.
- Work with the Finance Committee periodically to review and appoint the auditors.
- Present the annual accounts at the Annual General Meeting in a clear and accessible way.

Board Assurance

- Oversee and present budgets, internal management accounts and annual financial statements to the Board
- Advise on the financial implications of the organisation's strategic plans and annual business plans
- Provide assurance on the organisation's long-term sustainability, ie that the financial resources of the organisation meet its present and future needs.
- Keep the Board informed about its financial duties and responsibilities.
- Contribute to the fundraising strategy of the organisation.
- Sit on appraisal, recruitment and disciplinary panels as appropriate.
- Maintain and where appropriate support the upskilling of other trustees' understanding of charity finance.

Who we're looking for

Essential skills and experience

- Qualified accountant or equivalent senior financial leadership experience
- Experience of operating at Board level as an executive or non-executive finance professional
- Strategic vision
- Good independent judgment
- The skills to analyse proposals and examine and explain their financial implications
- Ability to think creatively
- Understanding of the legal duties, responsibilities and liabilities of Trusteeship
- Clarity on executive/non-executive roles and responsibilities
- Ability to use and access ICT

Essential attributes

- Commitment to Merton and Merton Connected
- Willingness to devote the necessary time and effort as Treasurer and Board member
- A preparedness to challenge and make difficult recommendations to the Board when necessary
- A willingness to be available to staff for advice and enquiries on an ad hoc basis
- Ability to work collaboratively and effectively as a member of the Board and in partnership with the CEO and their team.

Expectations

Trustees share collective responsibility for the governance of Merton Connected. The Board sets the organisation's strategic direction and ensures it operates within its governing document and legal

obligations. The Senior Leadership Team is responsible for delivering that strategy and managing day-to-day operations.

Time Commitment

Trustees meet as a Board around five times each year, in addition to the Annual General Meeting. Board meetings are usually in person (in Merton), and sub-committee/other meetings usually online. Trustees are expected to review board papers in advance and contribute actively to discussions. Trustees act as ambassadors for the organisation and may occasionally support external events or conversations where relevant.

The Treasurer will also chair the Finance Committee and be available to provide advice to the Chief Executive or Senior Leadership Team between meetings.

Trustees are appointed for an initial three-year term and may be reappointed. Reasonable expenses can be reimbursed.



Ready to apply?

[Click here](#) to apply with a CV and the answers to these questions (max 2 sides)

- ⇒ What interests you about becoming a trustee with us, and why would you like to join our board?
- ⇒ What skills, experience or perspectives would you bring to the role, and how would you support the charity's work and governance?
- ⇒ What makes you particularly suited to becoming Merton Connected's Treasurer?

The closing date for applications is 9am on **Monday 15th June**, with a view to interviewing shortlisted candidates in the week of **29th June**. If you would like a call to discuss the role in more detail, please email John Sanger of our recruitment partners Eastside People to arrange a convenient time at johns@eastsidepeople.org - this will not influence the success of your application.

If you are interested in the role but unsure whether your experience matches every requirement, we would still like to hear from you. We are committed to building a Board that reflects the diversity of the communities we serve. We particularly welcome applications from people whose backgrounds or experiences are currently underrepresented in governance roles.

If you require reasonable adjustments to support you during the application or interview process, please let us know and we will do our best to accommodate them.

A final note

We recognise that AI tools can be helpful, but please ensure your application reflects your own experience and motivations and is accurate and personalised. If you know someone who may be interested in the role, we would be grateful if you shared this information pack with them.



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