

# HEL<sup>o</sup>A

UK Vice-Chair (Finance & Governance)  
May 2026



## **What is the role?**

The Vice-Chair (Finance & Governance) is a trustee of the charity and part of the HELOA UK Committee (UKC). It is an elected role lasting for 3 years and they must be a member of HELOA.

The Vice-Chair (Finance & Governance) is accountable for managing the money of the charity responsibly and accurately by supporting volunteers to achieve good value for money for members in line with the charitable objectives. It is a crucial role within HELOA, enabling the organisation to achieve its charitable objectives. As well as being the main contact with charitable bodies in England & Wales and Scotland, you will advise the organisation on governance and policy issues, keep key policy documents up-to-date, and work on a variety of one-off and ongoing projects.

HELOA has a turnover of over £300,000 per year, with 150 member institutions, 9 groups and a minimum of 5 training events per year. The provision of accurate and detailed financial records is essential to the success and continued growth of the association. There are a variety of financial procedures that are undertaken throughout the year including budget profiles and audit preparation and overseeing payments made by the office.

## **What you will do**

- Be the financial controller for the charity and one of the signatories of the bank account
- Work with trustees to allocate their budgets and liaise with and support them to monitor their spend through reporting
- Work collaboratively with the Office team to manage day-to-day financial processes effectively
- Regularly review expenditure and charges to ensure value for money for its members
- Lead the review and development of key policy areas to ensure they are up to date
- Collaborate on Equality, Diversity and Inclusion initiatives and developments
- Contribute to the design and implementation of a professional development scheme for committee members
- Work with the wider UK Committee to implement HELOA's strategic goals

## **What you will learn**

- Develop an understanding of trustee responsibilities, including oversight of a charity with an annual turnover exceeding £300,000.
- Gain experience in budget profiling, financial management and reporting processes.
- How to use Sage One Accounting software.
- Develop skills in writing strategic financial documents for operational use.

- Gain experience in preparing and presenting finance reports to members and trustees.
- Develop knowledge and experience in policy and procedure development and management.
- Gain an understanding of financial management practices within a charity.
- Develop an understanding of how a charity operates and the importance of good governance in a charitable organisation.
- Develop skills in writing official reports and drafting and updating policy documents, including HELOA's strategy document and constitution.
- Gain experience in developing and implementing key policies including General Data Protection Regulation (GDPR), Equality, Diversity and Inclusion (EDI) and charity trustee guidelines.
- Work collaboratively with a team of volunteers from across the sector to achieve shared objectives.

**This role will be expected to:**

**1. Accounting**

- Oversee the recording of all income to and expenditure from the charity's accounts in Sage accounting software.
- Prepare reports on all budget income and expenditure against the budget for each UK Committee meeting (4 per year).
- Oversee the office administration of member subscription payments, invoicing for national events, partner and sponsor payments, UKC expense claims, and ensure financial records are accurately consolidated within Sage.
- Propose an auditor each Annual General Meeting and arrange for the auditing of the annual accounts for submission at the end of the financial year (1st April to 31st March), with support from the office.
- Report at the Annual General Meeting of HELOA detailing projected final spend and income.
- Prepare and submit financial information annually to the charitable commissions in England, Wales and Scotland.



## 2. Budgeting

- Receive HELOA budget requests from trustees for funding in October to set the overall next financial year's budget to be shared with the Annual General Meeting papers in November. These include training, partnerships, communications, groups, office, and the UK Committee.
- Recommend annual membership subscription fees effective from 1 April each year, for approval by the trustees.
- Liaise with the UK Vice-Chair (Training) to agree the delegate rates for HELOA national events.
- Co-sign national training event venue contracts with the Vice-Chair (Training).

## 3. Forecasting

- Prepare a financial report ahead of each UK Committee meeting, usually consisting of an income and expenditure forecast and a report on payments made in respect of all budget lines.
- Communicate strategic financial direction to the membership.

## 4. Administrative

- Provide strategic direction and review processes and operational work.
- Provide constructive challenge and support to trustees about management of their budgets and financial decision making relating to spending charity money in line with the 6 main duties of the essential trustee.
- Lead on crisis management relating to HELOA finances, as financial controller of the charity finances.
- Lead the review and ongoing development of the financial policy and procedures document to ensure best practice is being followed and regulations are being met.

## 5. Governance

- Develop and review HELOA's policies and standing orders.
- Prepare and submit annual reports for the Charity Commission and Scottish Charity Regulator.
- Advise trustees and the UK Committee on policy and constitutional requirements.
- Support the Operational Group to undertake an annual review of the charity's risk register.
- Communicate governance and policy updates to the membership.
- Review and implement the Equality, Diversity and Inclusion report and policy.
- Help to create a professional development framework for elected and appointed officers.

## Time commitment for the role

On average the role requires around 6 - 8 hours each month to complete business as usual work, which is usually a mixture of attending meetings, carrying out work and communicating with trustees and the UK Committee. Additional work through ad-hoc issues may also arise.

Workload is not spread evenly across the year, and busy times in the year for this role are:

## February

- Prepare updates for and attend the UK Committee meeting (online).

## April

- Report at the end of the financial year, the final spend to trustees.
- Prepare documentation for the auditor with office support

## June - July

- Share accounts and audit with trustees for approval, ahead of the Annual General Meeting.

## May

- Prepare updates for and attend the UK Committee meeting (in-person).
- Oversee the office paying UK committee expenses for the meeting.

## September

- Prepare updates for and attend the UK Committee meeting (online).

## October - November

- Prepare the Annual General Meeting documentation including a budget for the next financial year, liaising with trustees and budget-holders.
- Prepare and submit the annual report for the Charity Commission and the Office of the Scottish Charity Regulator (OSCR).

## December - January

- Prepare updates for and attend the UK Committee meeting (in-person).
- Oversee the office payments for UK committee expenses for the meeting and National Conference and invoicing partners and sponsors.
- Attend the Annual General Meeting and deliver finance and governance updates.



## **What are we looking for?**

- Excellent attention to detail.
- Strong communication skills.
- High levels of integrity.
- Proactive and team player.
- Excellent prioritisation and time management skills as your HELOA duties will have to fit in around your day job.
- A fast learner with the ability to quickly develop knowledge of Sage accounting software and HELOA shared systems; training will be provided.
- Willingness to develop an understanding of trustee responsibilities and the management of a charity bank account.

## **Reporting Procedure**

The Vice-Chair (Finance & Governance) is part of the Operational Group and reports to the HELOA Chair. Attendance at UK Committee meetings is encouraged and attendance at the Annual General meeting (AGM) and national conference are compulsory.

## **Remuneration**

Roles with HELOA are undertaken on a voluntary basis. HELOA covers all travel, accommodation and sustenance costs for UK Committee meetings and other HELOA business. A funded place to support the organisation and successful running of the National Conference, will be provided, for the duration the individual is in post.

## What's it like in practice?

**Fiona Curry**, previous Vice-Chair (Finance) shares her experience of the role and the skills she has gained...



*I've gained a unique opportunity to oversee the finances of a small, yet growing charity, gained senior leadership skills through working with the executive team and trustees who are budget holders, to project costs for the next financial year (1st April- 31st March) while monitoring spend for the current financial year.*

This has required excellent planning and communication and attention to detail of the finances. It's been essential to understand the greater financial impacts of inflation and its impact on the charities finances buying services for its events and UKC and group meetings, while balancing the value for money to the membership institutions.

Moving from partnerships which is a much more externally facing role into finance, more internally focused, has given me a greater opportunity to work closely with the fantastic office team, and engage with every area of UKC, communications, partnerships, training in particular, groups and governance. It's given me a greater understanding of the way HELOA works, the risks to the association financially and given me an opportunity to mitigate some of those risks to support the future of the charity. I'm proud of the work I've achieved in collaboration with the UKC team of volunteers and Dawn and Louise in the office, and am grateful for the opportunity I have had to volunteer the last 5 years, with dedicated volunteers across the UK. I look forward to a new Vice-Chair (Finance) to continue to improve on the foundations that have been made to date.

For more information about the role, please contact Clive Sheridan, UK Vice-Chair (Finance & Governance) at [finance@heloac.ac.uk](mailto:finance@heloac.ac.uk)