

HARLOW u3a ROLE DESCRIPTION: SHADOW TREASURER

THIS ROLE MUST BE HELD BY A TRUSTEE

- It is the role of all trustees to ensure the “object” of Harlow u3a’s constitution is promoted and fulfilled. (the object of the CIO is the advancement of education and, in particular, the education of older people and those who are retired from full time work, by means including associated activities conducive to learning and personal development.” (Pg 1 point 3 of the Constitution)
- All role holders should be familiar with policy and practice which relate to the running of Harlow u3a, specifically: Harlow u3a Constitution, the Role of a Trustee, Data Protection and Privacy policies, Safeguarding Guidance and Protocols.

PURPOSE:

The purpose of the Shadow Treasurer role is to –

1. Support the Treasurer.
2. Strengthen the Committee’s financial capability.
3. Be familiar with Harlow u3a’s records, accounts and financial documents so as to ensure that this knowledge is not vested solely in the Treasurer.

KEY TASKS:

The main tasks are to –

1. Understand the financial records and their output so as to be able to ask informed questions and to make comments and suggestions where appropriate.
2. Have access to the bank accounts and monitor activity as necessary.
3. Assist the Treasurer in major tasks such as the preparation and approval of annual accounts.
4. Deputise occasionally for the Treasurer.

RESPONSIBILITIES AS A COMMITTEE MEMBER

1. Attend and contribute to Committee meetings and be prepared to assist with/perform any other tasks as agreed with the Committee.
2. Promote the u3a ethos and encourage others to join the u3a and/or volunteer to assist the Committee where required.