

THE CHARITY TREASURERS FORUM – LES JONES, EXECUTIVE DIRECTOR OF THE FORUM

The Voluntary Sector has a number of bodies that bring key people together. They roll off the tongue CFDG, NCVO, ACVO Institute of Fundraising etc. All these bodies greatly enhance the sector and as well as many other things provide excellent personal support for individuals.

About a year ago however, a gap was spotted in this “market.” What about Honorary Treasurers? Honorary Treasurers are absolutely vital cogs in any charity’s machinery. They have special responsibilities and generally a lot is delegated to them by the Trustees. They are obviously well supported by Directors of Finance but at the same time they have a different role to play and of course they are part time and unpaid. The demands on them are however widespread and range from reading and understanding the SORP to being the person all Trustees look to when the budget is approved or an important high cost project is being considered.

It seemed absolutely logical therefore that a mechanism should be created to bring together the Honorary Treasurers of charities to meet, network, discuss matters of common concern and occasionally resolve to collectively do something about them.

It was against this background that the Charity Treasurers Forum was born. It was the brainchild of David King (the Hon. Treasurer of NCVO) and Paul Palmer (Professor of Voluntary Sector Management – CASS Business School.). The first Executive Director of the Forum was Geoff Miller (the then Chairman of CFDG) and I took over from him in October 2003. The seed money to get the Forum going was kindly donated by U.B.S.

The Forum set out to offer Treasurers an opportunity to:-

- 1) hear distinguished thinkers and opinion formers speak on key subjects
- 2) receive high level intelligence on critical charity issues through regular briefings.
- 3) frequently discuss the role of the Honorary Treasurer in charities and how this should develop.
- 4) exchange views in a confidential setting with peers from other charities and maintain this network.
- 5) identify collective concerns and issues so that relevant third parties can be lobbied and specific issues identified
- 6) receive occasional tailor made technical briefings
- 7) liaise with other representative finance groups in the sector particularly the Charity Finance Directors Group and the Charity Consortium.

The Forum is clearly seeking to fill a unique role and work with, rather than overlap with other organisations. The Forum will also have a light touch and not intrude too much into the lives of already busy people who work hard on behalf of their charity's for no financial reward. The Forum is still quite new and still attempting to find its feet and refine its role. A questionnaire on what the Forum should do and when it should meet is currently being distributed to Hon. Treasurers. This will be the start of a dialogue on the future development and direction of the Forum with Honorary Treasurer views being the ultimate determinant of where we go from here.

Crucial to the success of the Forum will be constructive partnership with other organisations. There are obvious links and CFDG and the Forum is working closely with Shirley Scott to ensure maximum synergy. There may be joint meetings of the Forum and CFDG in future and CFDG representatives will be invited to all meetings of the Forum. Other organisations have also shown an interest in the Forum and the last meeting which took place on the 30th March was attended by representatives from the Charity Commission, NCVO, the Charities Consortium, Haysmacintyre, Kingston Smith, The Co-operative Bank and Whithers Solicitors.

A good illustration of the work of the Forum is the subject matter etc. of the meeting on 30th March. The subject of the meeting was Transparency and Accountability and the meeting received two excellent presentations from Erica Roberts, the Chief Executive of GuideStar and David Taylor, the Charity Commissioner responsible for finance. Erica was able to inform the meeting of the ambitious plans she has for setting up the GuideStar database with some 163,000 charities included by the time of the public launch date in April 2005. David was able to describe what are likely to be the main features of the Charity Bill and the revised SORP when they are published for consultation.

The Forum has two further meetings planned for 2004, one on the 30th June when the subject will be "The challenges facing Honorary Treasurers and their Charities" when the meeting will be addressed by Honorary Treasurers themselves and a lunch time meeting on the 30th September at the House of Lords with a key note speaker.

The meetings of the Forum are usually held in London at the CASS Business School, City of London University, which is a very fitting neutral ground resonant with academic gravity!

If any Honorary Treasurer or Trustee with financial responsibility wishes to join the Forum (there is no fee!) please can you contact Les Jones, phone/fax 0118 9412365 or email LJones1000@aol.com. I will be pleased to hear from you.