



**Honorary Treasurer
Recruitment Pack**

2025

Contents

Introduction 3

About SOFII 3

SOFII Board of Trustees..... 5

Honorary Treasurer Role Profile 6

What We Can Offer Trustees 7

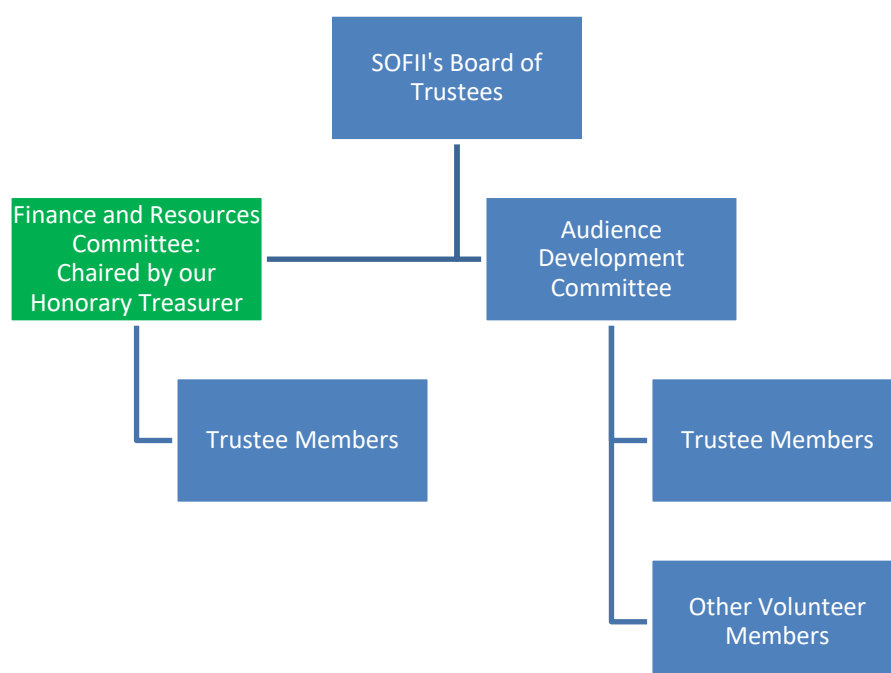
What We’re Committed To..... 8

How to Apply..... 8

Introduction

SOFII is a charity created by fundraisers for fundraisers. We are here to help fundraisers be their best by sharing the innovation and inspiration that drives and invigorates our sector. SOFII is a gift to you and to charitable fundraisers everywhere – an easily accessible free archive of the best fundraising practice and innovation from around the world. We are safeguarding our fundraising history and constantly adding new content to educate and inspire.

We are looking to recruit a new trustee with a passion for finance to serve as our Honorary Treasurer and chair our Finance and Resources Committee. This vital role will help ensure that SOFII is able to manage its financial resources strategically and prudently, enabling us to reach even more fundraisers around the world, inspiring them to be even better at their jobs so the great causes they support can deliver even greater impact.



About SOFII

SOFII was founded in 2007 by Ken and Marie Burnett. Our key resource is our [website](#), featuring over a thousand articles, including case studies of fundraising best practice, an archive of fundraising history, how-to guides, analysis, and more – all freely accessible to fundraisers. Our weekly emails reach nearly 11,000 fundraisers around the world, and our ambition is to significantly increase our reach. We aim to serve the full diversity of the fundraising sector by including content that is relevant to fundraisers working across all fundraising disciplines and geographies, and we are particularly keen to grow our reach beyond our home country of the United Kingdom. We have recently formed a new volunteer-led Audience Development Committee to help us advance this ambition.

SOFII is also famous for our flagship “I Wish I’d Thought of That” (IWITOT) event, where fundraisers share the fundraising ideas that have inspired them so much, they wish they had thought of them originally. Developed in partnership with Open, our first IWITOT event was hosted in London over

12 years ago, and over the years, we've hosted in-person and virtual IWITOTs in the US and Canada in addition to a Spanish-language edition for fundraisers in Latin America, and we have delivered IWITOT events in partnership with the AFP, the CIOF, the Fundraising Institute of Australia, the Association Française des Fundraisers, and the Resource Alliance. We are now pleased to offer a fully hybrid event so we can share the learning with fundraisers irrespective of their physical location. At our 2023 event, we hosted fundraisers from Australia, Austria, Belgium, Canada, Denmark, France, Germany, Italy, New Zealand, Norway, Poland, Slovenia, Ukraine, and the US, as well as all from all four nations of the United Kingdom.

SOFII does not employ any staff, relying for the delivery of all its services and activities on the efforts of volunteers and self-employed people working on specific tasks. The latter are led by Lynda Harwood-Compton and include Joanna Culling and Carolina Herrera.

At present SOFII has nine trustees: Kevin Delaney, Heather Little, Rachael Moore, Angélique Masse Nguyen, Bharati Ramachandran, Charmaine Shah, Victor van der Veen, João Paul Vergueiro, and Andrew Watt. You can read more about SOFII's board [here](#). With the pending retirement of David Carrington, who was a founding trustee of SOFII and who has offered many years of dedicated service as our Honorary Treasurer and Company Secretary, SOFII is now looking to recruit a new Honorary Treasurer.

You can read more about SOFII's activities and our financial position in [our annual report](#).

SOFII Board of Trustees

The main responsibilities of a SOFII trustee are to:

- Set and maintain the charity's vision, purpose and values
- Develop strategy, establish policies and priorities, and supervise the operations and behaviour of the charity
- Promote the work of the charity across their own networks globally and safeguard its reputation
- Ensure accountability to supporters and to funders
- Maintain fiscal oversight and sustainability and safeguard the charity's intangible and tangible assets
- Ensure compliance with the charity's governing document and with all relevant legislation and regulation
- Maintain effective governance and board performance.

Time Commitment for SOFII Trustees

Trustees of SOFII are expected to attend approximately four meetings annually (at present, these are held virtually, usually from 8am-930am UK time on a weekday to accommodate the geographic distribution of our current trustees) and to serve on one of our trustee subcommittees. Our subcommittees meet roughly quarterly, and there may be occasional ad hoc trustee meetings when urgent matters arise.

Trustees are encouraged to participate, where appropriate and possible, in SOFII events and webinars. They are also encouraged to assist the development of the charity by securing additional sponsors/partners, donors and supporters, to represent and speak on behalf of the charity, and to generate content for the SOFII website (for example by identifying new case histories and introducing new content providers).

SOFII trustees are appointed initially for a three-year term, which can be extended for a second term.

Person specification

We are looking for trustees who are passionate about SOFII's mission of catalysing social change through outstanding fundraising. Some of the qualities we are looking for from our trustees and volunteers include:

- Ability to work collaboratively and effectively as a member of a diverse team
- Expertise in particular fundraising disciplines
- Strong and wide networks within the fundraising sector
- Sufficient time, energy and enthusiasm to dedicate to the role
- A commitment to SOFII's values and to promoting equality, diversity and inclusion

Previous experience of serving on the Board of a UK charity is **not** required.

Honorary Treasurer Role Profile

In addition to the role description of a general trustee, the Honorary Treasurer will

- Chair SOFII's Finance and Resources Committee
 - Work with the committee members to develop an annual workplan for the committee
 - Work with the SOFII Director to prepare the agenda for committee meetings and ensure that papers are prepared for committee meetings in a timely manner
 - Chair regular meetings of the committee (roughly once a quarter)
- Work with the SOFII Director to develop an annual budget for the charity and to monitor performance against that budget
- Work with the rest of the board to ensure they understand SOFII's financial picture and can fulfil their duties to safeguard the charity's finances
- Serve as the main point of contact with our external bookkeepers, reviewing the management accounts as they are produced
- Serve as the main point of contact with our independent examiner, ensuring that the annual report and accounts and the annual return are prepared and submitted on time
- Serve as an authorised signatory on SOFII's bank account, helping to ensure payments are made in a timely fashion
- Work with the SOFII Director and the committee to develop and monitor the charity's risk register
- Build a strong and effective working relationship with the Chair, the other trustees, and SOFII's team of freelancers with a view to ensuring the charity can advance its mission
- Other duties as may emerge from time to time

Time Commitment for the Honorary Treasurer

We would anticipate the Honorary Treasurer role would involve a time commitment of roughly 6-8 hours per month.

Person Specification

Same as for a general SOFII trustee with the following additional essential qualities:

- Comfort working with budgets and forecasts
- Familiarity with charity accounting concepts
- Attention to detail

SOFII is a small charity with relatively simple accounts, and we believe that this role can be performed by someone who does not hold a formal accounting qualification. Whilst SOFII operates entirely virtually and we have embraced trustees from around the world, because of the requirement to serve as a key point of contact for our external bookkeepers and our independent examiner (both based in the UK) and as a signatory on our bank account, we think this role will be best suited to an individual based in the UK.

What We Can Offer Trustees

We think volunteering with SOFII is a great way to enhance your career as a fundraiser while giving back to the sector. In the words of one of our long-serving trustees, Craig Linton:

"I was honoured to become a trustee for SOFII and have enjoyed being part of the board. There are two main reasons I'd recommend becoming a trustee. One personal. One professional."

"On a personal level I felt it was a great chance to give back and contribute to the fundraising profession. SOFII has been a faithful companion throughout my career and to play a small part in helping it to flourish really appeal to me."

"On a professional level, it has been a great learning and networking experience. Being on the other side of the table. Making decisions. Deciding strategy. Working alongside a great team of fundraisers who are ambitious and care deeply about the impact SOFII can have. Please do consider becoming part of the team – it would be great to have you on-board."

Here's what we can offer our trustees:

- A comprehensive induction programme, introducing you to SOFII and to your role-specific requirements
- An assigned "buddy" from our current trustees to help you get acquainted with the charity
- A chance to learn about new fundraising disciplines and areas of fundraising
- An opportunity to grow your own professional network, connecting with fundraisers around the world
- A chance to be part of a dynamic, entrepreneurial environment and to make a meaningful impact within the global fundraising community.

We really mean this last part. If you want to understand the difference that SOFII makes to real-life fundraisers, just have a look at some of the feedback we received from our community in our recent user survey:

"As a fundraiser and copywriter, SOFII is absolutely vital to my job. I'm on it ALL THE TIME. And it makes me proud to be connected to a global community of peers."

"What SOFII offers is useful, inspirational, best practice - the fastest way to learn and innovate"

"The content of SOFII showcases some of the very best in fundraising."

"SOFII is a great free resource from and for fundraising professionals worldwide."

"I would not be able to complete my work to its fullest potential without SOFII. This website has given me the tools and the confidence to begin my journey as a fundraiser, and I consistently refer to the articles and archives when pursuing any new project or task."

"SOFII inspires me to be a better fundraiser. It exposes me to ideas, campaigns and new techniques that I would otherwise not come in to contact with. IWITOT is my favourite sector event of the year!"

"SOFII is a treasure trove, especially for those new to fundraising like myself."

“The wheel was a great invention; no need to reinvent it. Only to adapt to new purposes. That's how I think about SOFII. Why not borrow from the best of the best?! Sharing is caring, and that's what SOFII is all about. Thank you for being you.”

“SOFII is inspiring and practical - it really does help me to be the best fundraiser I can be. It helps me follow best practice, stay true to my donors, and also provides really valuable evidence of effective fundraising techniques that I can share with non-fundraising colleagues. SOFII is like having a very wise, older, more experienced colleague, always on hand to give useful advice and support - a Yoda of the fundraising world.”

What We're Committed To

SOFII is committed to serving the global fundraising community in all its diversity, and we welcome applications from fundraisers from a range of backgrounds, no degree required! We work hard to ensure our community is inclusive and welcoming. This includes at our events, where we have a [strong commitment to personal safety](#) and operate a zero-tolerance policy for bullying and harassment in all forms. If you want to work with us, it is important that you share a commitment to the values we hold dear.

SOFII's Values

- Inclusivity
- Respect
- Transparency
- Integrity
- Innovation
- Inspiring
- Courage

How to Apply

Candidates who are interested in applying to become SOFII's Honorary Treasurer should send a CV and covering letter setting out why they are interested in the role and how they feel they meet the person specification to recruitment@sofii.org by Friday 23rd May 2025 at 5pm UK time.

We are aiming to conduct interviews during the week of 2nd June 2025, if you're selected for an interview, we'll share the topics we plan to cover in the interview with you in advance.

If you have any questions, please contact recruitment@sofii.org.