



STEP BY STEP

Young People. Hard Times. Bright Futures.

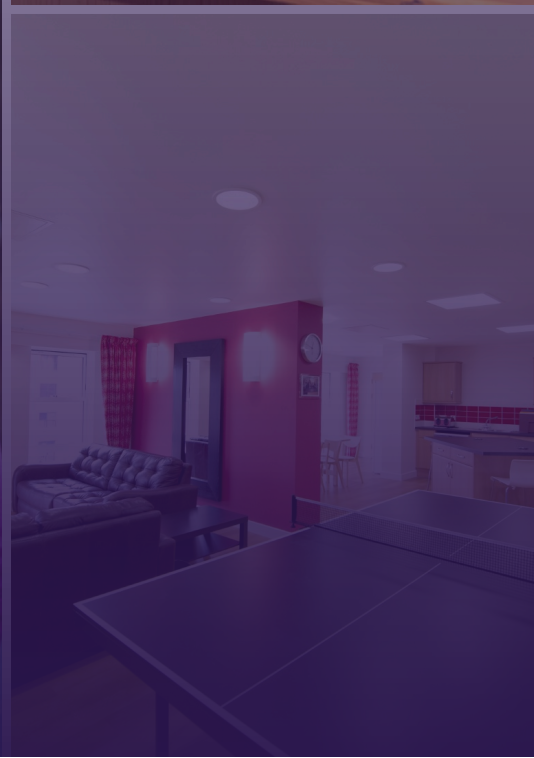


CANDIDATE INFORMATION PACK

TREASURER

Board of Trustees // July 2026

YOUNG PEOPLE. HARD TIMES. BRIGHT FUTURES.



A WORD FROM OUR CHAIR

DEAR CANDIDATE

This is a wonderful opportunity to join the Board of Step by Step as Treasurer.

Step by Step is a charity based in Aldershot, active across six counties in the South of England. We are taking a stand against youth homelessness and its causes, offering safe places to live and the opportunity to rebuild lives. We know that young people need more than a roof over their head if they are to leave homelessness behind them.

That is why we offer a range of services that include accommodation, counselling, wellbeing support, and advice and guidance. We help young people identify their potential, overcome their challenges and work towards a sustainable, independent future. Our approach combines early intervention with longer term support, leading to measurable, lasting change for hundreds of young people each year.

Recent years have seen a strong focus on financial stability, generating reserves of £2.4m, while at the same time taking strategic action to invest in our leadership team, including the finance function, and the expansion of our accommodation and support services. We have a strong Board of eight people with mixed experiences all making a valuable contribution to the Charity's success. After over 7 successful years in-post, our current Treasurer is retiring, and we are now looking for a new person to support and guide the Charity into the future; someone who can support the Charity's Head of Finance and form productive relationships with the CEO and wider Board.

This is a wonderful opportunity to join a great and inspiring team. I hope you enjoy finding out more about the role over the next few pages. If you feel that you meet the requirements for the role professionally and personally, we look forward to hearing from you.

Sincerely,

ANDREW MITCHELL

Chair // andrew.mitchell@stepbystep.org.uk



ANDREW MITCHELL
CHAIR OF THE BOARD

THE ORGANISATION



HEAD OFFICE

Aldershot, North East Hampshire
(42 miles from London)

AUDITOR

Moore Kingston Smith

FIND OUT MORE

www.stepbystep.org.uk

STRUCTURE & PURPOSE

Step by Step ("SbS") is a private company limited by guarantee and registered charity supporting young homeless people across Hampshire, Berkshire, Surrey, Wiltshire, Dorset and West Sussex. SbS has a wholly-owned subsidiary, Step by Step Fostering Limited, which is an Ofsted-approved independent fostering agency established in 2021.

KEY FINANCIALS // YEAR ENDED 31 MARCH 2026

£4.5m

Total income, with a surplus of around £55,000

£3.5m

From local authority contracts each year

£2.4m

Total reserves at the last year end

Our fundraising team generates upwards of £800,000 each year, with the current target approaching £1m.

THE BOARD

A multi-disciplinary Board with skills that span the social services, financial, marketing, legal, human resources and recruitment worlds. One of our trustees is also someone who has benefitted personally from the Charity's work. We seek to share knowledge, expertise and learning, and conduct ourselves in an open and collaborative manner.

Andrew Mitchell **CHAIR**

Formerly partner in a City law firm and founder of a property investment firm. Now retired.

Lucy Barnes **SECRETARY**

Qualified corporate lawyer and head of the company secretarial function of a leading regional law firm. Lucy has previously served on a number of school and church boards and held a position of safeguarding officer.

Clare Gallagher

Chartered Fellow CIPD. Established HR leader with global experience in Manufacturing, Financial Services, Engineering, Pharma and Retail.

James Mowat

20+ years as a recruitment executive and Managing Director of an agency, specialising in the MEP and data centre sectors.

Sashi Mylvaganam **TREASURER — RETIRING**

Qualified Chartered Accountant with 30 years' experience in industry, where he has held senior positions in private and public companies. School Governor and Councillor at Surrey Heath Borough Council.

Sir Jonathan Portal

Qualified Chartered Accountant who has held senior financial roles in a number of medium-sized commercial companies. Currently advises a portfolio of small companies on financial and general management matters.

Caroline Skerry

Co-founder of a successful communications agency, Caroline is a 15-year veteran of the marketing and public relations sector.

Becky Ward

Becky has worked across the third sector for over 30 years in a wide range of roles supporting young people, including as a safeguarding officer, programme lead and researcher. She is a research consultant and Research Director at a homelessness research centre.

THE LEADERSHIP TEAM

Debbie Moreton
Chief Executive

Kelly Headen
Head of Services

Alice Thurlow
Head of Finance

Anda Chiu
Head of Fundraising

Nic Goom
Head of Strategic Marketing
& External Affairs

Rebecca Palmer
Head of HR

A QUALIFIED FINANCE TEAM

The Treasurer is supported by a professionally qualified finance team currently performing to a high standard. Since the current Head of Finance took up post, our annual audits have raised no audit findings or recommendations to improve financial controls.

THE ROLE

TOTAL TIME COMMITMENT

Equivalent to 2–3 days per month, which includes:

- 4 Board meetings per year
- Chair of the monthly Finance call
- Chair of the Audit & Remuneration Sub-Committee (ARSC) — 2 meetings per year
- 1-1 meetings with the Head of Finance
- Oversight of audit and the auditor relationship
- Oversight of banking and cash management
- Physical presence on a charity site from time to time
- Prompt response to emails and calls throughout the month, including authorisation of payments

REMUNERATION

PRO BONO

DURATION OF TERMS

Initially a **3-year appointment**, with possible renewals.



THE PERSON

ESSENTIAL

- ✓ The highest standards of personal integrity and professionalism.
- ✓ Strong interest in the social issues of youth homelessness and supporting vulnerable and disadvantaged young people.
- ✓ Strong financial and accounting experience gained at a senior level, including a recognised accountancy qualification.
- ✓ Experience should include management accounts, budgets, forecasts, cash-flow projections, statutory accounts and audit findings, as well as financial governance, internal controls, risk management, reserves, investment oversight and organisational sustainability.
- ✓ Sound judgement, independence of mind and the confidence to provide appropriate challenge.
- ✓ A collaborative and supportive approach, with the ability to work effectively with the Chair, CEO, Head of Finance and fellow Directors.
- ✓ Sufficient time and flexibility to devote to the role, including responding to emails and approving payments, and availability to attend meetings in person at the Charity's premises.

DESIRABLE

- + Previous experience as a charity trustee, Treasurer and/or non-executive director.
- + Experience of charity accounting, including the Charities SORP, restricted and unrestricted funds, reserves policies and charity reporting requirements.
- + Knowledge of the legal and regulatory duties of charity trustees and company directors.
- + Experience of organisations funded through public-sector contracts, grants, fundraising and other mixed-income sources.
- + Familiarity with safeguarding-led organisations.



THE RECRUITMENT PROCESS

01

STAGE ONE

Initial conversation /
meeting with the Chair.

02

STAGE TWO

Meeting with the CEO and
Head of Finance.

03

STAGE THREE

Meeting with other
selected Directors.

READY TO GUIDE THE FUTURE OF STEP BY STEP?

Please send an up-to-date CV and a cover letter to:

recruitment@stepbystep.org.uk

An offer of appointment will be made after successful completion of background checks and attendance at a Board Meeting (in an observer capacity).

SAFEGUARDING

We are committed to safeguarding and promoting the welfare of children and young people, and all staff are expected to share this commitment. As part of our safer recruitment process, we will complete reference checks, a DBS check and confirm your full employment history, as well as other pre-employment checks.



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