

## Advert for HWDT Trustee (Treasurer)

### Introduction

The Hebridean Whale & Dolphin Trust (HWDT) is looking for a hands-on treasurer from May/June 2026 to support our financial management and reporting processes and help develop our financial strategy. This is an exciting opportunity for a finance professional to use their skills to support an established and ambitious marine conservation charity.

We have a strong board of committed trustees and a small talented [team of staff](#). We are currently seeking applications from people who have the necessary financial skills and experience to ensure the Trust's financial viability and who possess a genuine passion for the marine environment and its conservation.

### About Hebridean Whale & Dolphin Trust

The Hebridean Whale & Dolphin Trust (HWDT) is working for healthy seas for nature and communities. For over three decades HWDT has been leading the way for the conservation of whales, dolphins, and porpoises in the waters of western Scotland.

Based on the Isle of Mull, in the heart of the Hebrides, HWDT carry out long-term research to monitor and protect cetaceans, inspire people to take action and make a difference, inform decision-makers, and advocate for the recovery of the marine environment.

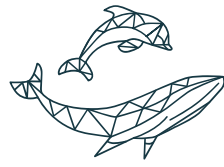
We believe in citizen science, involving people in everything we do. Our marine mammal research is supported by over 100 volunteers each year, who join us on board our research vessel *Silurian*, as well as an 8,000-person strong Whale Track sightings community. Our long-term research has critically advanced the understanding of both resident species and those that visit seasonally. Data collected from our citizen science projects informs protection measures for minke whales, Risso's dolphins, harbour porpoises, and basking sharks across Hebridean seas.

Using what we have learnt, we work directly with communities to encourage stewardship of our rich seas. Our education projects reach out to over 20,000 people each year to highlight the importance of the marine environment and encourage people to take responsibility for protecting it for future generations. To find out more about HWDT please visit our website: [hwdt.org](http://hwdt.org).

### Role summary

HWDT is a registered charity and a company limited by guarantee. The trustees of the charity are also the volunteer directors of the company. The Trustee Board is supported by three sub-committees: Finance and Personnel Committee, Boat Committee (HWDT's research vessel) and Conservation Committee.

The overall role of treasurer is to maintain an overview of the Trust's financial affairs, ensure the Trust's financial viability, and ensure that proper financial records and procedures are maintained.



The Treasurer works in co-operation with, and provides support and advice to the Chair, the Director and the Finance Officer. Specific responsibilities are:

### **Role responsibilities**

#### Providing strategic financial leadership to the board

- Advising on the financial implications of the Trust's strategic plans.
- Keeping the Board of Trustees informed about its financial duties and responsibilities.
- Presenting management accounts at trustee meetings and encouraging dialogue and participation from charity trustees.
- Making a formal presentation of the accounts at the annual general meeting, drawing members attention to important points.

#### Monitoring the overall financial performance and highlighting financial risks

- Ensuring that appropriate accounting procedures and controls are in place.
- Ensuring that the Trust has an appropriate financial reserves policy.
- Supporting the development of an appropriate investment policy for the Trust.

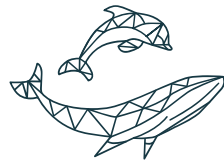
#### Ensuring the Trust's compliance with statutory financial reporting requirements

- Ensuring that the financial resources of the Trust are properly applied to the pursuance of its objects as set out in its governing documents.
- Ensuring that processes and procedures are in place for the timely presentation, review and approval of budgets, accounts and financial statements.
- Ensuring that the annual accounts are scrutinised by qualified examiners or auditors and that any recommendations are implemented.

#### Supporting the Finance Officer and CEO with financial matters

- Liaising with staff about financial matters, providing training and support as required.
- Leading on preparing the charity's annual accounts, with support from relevant staff.
- Supporting the staff team with the preparation of quarterly management accounts.

A summary of the primary responsibilities of all charity trustees is available here: <https://www.oscr.org.uk/managing-a-charity/trustee-duties/>.



## Person specification

We are looking for a qualified accountant with knowledge and experience of charity finances, who can explain complex finance information in an accessible way and believes in the work HWDT does.

### Personal Qualities

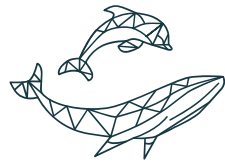
- A strong passion and commitment to the mission of HWDT and the ability to work collaboratively with a board of trustees.
- Good communication and interpersonal skills.
- A preparedness to make financial recommendations to the board.
- A willingness to be available to staff for training, advice and enquiries on an ad hoc basis.
- Impartiality, fairness and the ability to respect confidences.

### Experience

- Experience of charity governance and working with or as part of a Board of Trustees/committee.
- Qualified accountant with experience of preparation and review of financial statements, including working with auditors.
- Good knowledge of financial controls, budgeting, forecasting and other financial practices.
- Proven ability to communicate and explain financial information to members of the Board, charity members, and other stakeholders.
- Demonstrated knowledge and experience of charity fundraising and finance practice.
- Experience of pension schemes.
- Ideally, experience of a Company Secretary role.

### Knowledge and skills

- The skills to analyse proposals and examine their financial consequences.
- Broad knowledge and understanding of the charitable sector.
- Good knowledge of charity legal and regulatory requirements and guidance.
- Good, independent judgment and confident decision maker.



We value having different experience and points of view on our board. HWDT welcome applications from people currently under-represented, including women and those with protected characteristics, such as disabled people, LGBTQ+ people, those from black and minority ethnic communities and people aged under 50.

**Remuneration:** This is a voluntary unpaid role, although reasonable expenses for travel will be reimbursed.

**Reporting to:** Board of Trustees.

**Location:** The office is in Tobermory, Isle of Mull, but we are open to trustees from all around Scotland. Although not essential, our preference is for the treasurer to be based in the local area around Mull or the west coast of Scotland.

**Time commitment:** The HWDT Board meets four times a year by video conference. The Annual General Meeting (AGM) is held once a year, usually in October/November, also by video conference. The board holds at least one face to face meeting each year, which takes place on the Isle of Mull/Oban, and provides an opportunity for Staff and Trustees to spend consolidated time together. This usually takes place over a weekend. The treasurer is required to attend the one sub-committee, which also meets quarterly. The treasurer provides accountancy support for the Finance Officer on an ad hoc basis. The time commitment is estimated to be around 10-15 hours per month on average.

**Terms:**

The charity's treasurer will be co-opted by the current board and will be eligible for election as a trustee at the next AGM in November 2026. The charity's treasurer must be a member of the charity to be eligible for election as a trustee. The charity's trustees serve a three-year term before retiring. Trustees are eligible for re-election after the initial three-year term.

**Application procedure:**

To arrange an informal discussion about the role please contact Alison Lomax, HWDT Director at [alison.lomax@hwdt.org](mailto:alison.lomax@hwdt.org).

To apply send a CV and a Covering Letter of up to 500 words (1 page maximum) outlining key skills, knowledge and relevant experience and your reasons for applying to become a trustee of HWDT to Alison Lomax at [alison.lomax@hwdt.org](mailto:alison.lomax@hwdt.org).

**Closing date for applications:** Midday on the 19<sup>th</sup> of May 2026. Initial interviews will take place, via video conference week commencing 25<sup>th</sup> May 2026.

Ideally, the candidate will be available to start in late May or early June, and able to join a scheduled audit planning meeting on 15<sup>th</sup> June as part of a handover with the current treasurer.

HWDT's privacy policy is available to read [here](#) and equal opportunities policy is available [here](#).