

Type: Guide	<b>Northumbria Blood Bikes: NBB Auxiliary Role – Financial Assistant</b>		
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Approved:	06/09/22	By:	Executive Committee
Doc Ref	AUX 4302	Version	Draft

**A. Why do we need this Procedure**

This guide sets out the roles and responsibilities of an auxiliary financial assistant to the treasurer

**B. Who is responsible for this Procedure**

The treasurer of the group is responsible for the maintenance of this guide. The Executive Committee is responsible for approving this guide. All members of NBB Committee and any holder of the ICT Assistant role must be familiar with the information in this guide.

**C. When will this Procedure be reviewed**

The Procedure will be reviewed a maximum of Two Years following its approval.

**D. How will changes be notified**

The latest version of the Procedure will be made available via the members' library on the group website. New versions will be announced via email to all members of the executive committee and holders of the auxiliary financial assistant role.

## **1. Aims of the Procedure**

- 1.1.** The auxiliary financial assistant will be involved with the setting up and managing of the gift aid procedure within NBB, the skills of the role holder are as agreed with the Treasurer and may include:
  - 1.1.1.** Creation, maintenance and updating of a gift aid register.
  - 1.1.2.** Contact eligible donors via post or email for authority to apply for gift aid on their behalf
  - 1.1.3.** To input the donors gift aid details onto the HMRC website
  - 1.1.4.** Liaise with committee and other auxiliary role holders and members as required

## **2. Role reporting**

- 2.1.** The auxiliary financial assistant reports to the treasurer
- 2.2.** The treasurer may need to liaise with the committee or other auxiliary role holders and members as required.

## **3. Security and Confidentiality**

- 3.1.** To maintain the security and absolute confidentiality of all personal data relating to the gift aid donor's personal information and any information deemed confidential to the charity, the auxiliary financial assistant will be required to agree to a confidentiality agreement to that effect
- 3.2.** The role holder(s) will be required to act in accordance with all GDPR regulations in force at the time

## **4. IT System Requirements**

- 4.1.** This role may require additional access to ICT systems beyond those of a normal member
- 4.2.** This role will also require the auxiliary assistant to have authorisation and access to the NBB HMRC website
- 4.3.** If needed the ICT officer will provide and remove any additional access as required.

**Northumbria Blood Bikes:  
NBB Auxiliary Role - ICT Assistant**

**Version Control and History**

<b>Date</b>	<b>Version</b>	<b>Author:</b>	<b>Reason For Change</b>
Sep 2022	Issue 1	Steve Tulloch	Issue 1t