



## Trustee (with Financial Experience)



### What will you do?

- complete an introduction for your role
- maintain an awareness of how the local Citizens Advice is operating
- read papers for board meetings and attend as many meetings per year as possible of the Executive Committee in addition to leading on any Finance Committee meetings to discuss finances in more detail
- explain, guide and advise the board on the key assumptions and financial implications of the local Citizens' Advice budgets, operational and strategic plans
- ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services' needs
- supporting any paid finance officer to explain, guide and advise the local Citizens Advice on the approval of budgets, accounts and financial statements with the organisation's framework and provide professional guidance as necessary
- present accounts at the Annual General Meeting (AGM) in an accessible way for volunteers and staff
- ensure that annual accounts are prepared in compliance with SORP (Statement of Recommended Practice) Accounting for Charities and submitted by the deadline to the Charity Commission and/or Registrar of Companies, and make arrangements for them to be audited or independently examined as required
- keep the board informed about its financial duties and responsibilities
- monitor the organisation's income and expenditure position and in conjunction with any paid finance officer present accessible reports at

least quarterly to ensure board members understand the accounts and implications

- understand the accounting procedures and key internal controls to be able to assure the board that the charity's financial integrity is sound
- work with Citizens Advice staff, such as the Chief Officer, Treasurer or Finance Manager to give information and advice on financial matters
- work together with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice, including developing a fundraising strategy
- take an active discussion during board meetings and work with other trustees to:
  - set policy and strategy direction, set targets and evaluate the performance of the local Citizens Advice
  - seek the views of all sections of the community and monitor how well the service meets the needs of the local community
  - ensure that the service plans for the recruitment and turnover of staff and volunteers
  - ensure that all the finances and supporting financial control systems of the local Citizens Advice are in order including that full financial records are kept for all transactions, that money is only spent for the purpose given, and that proper financial controls are in place to safeguard the organisation's resources
  - monitor the financial position of the local Citizens Advice ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management
  - review its own work and how effectively it operates including action for improvement



## What's in it for you?

- make a positive impact for people in your local area by ensuring the local Citizens Advice is sustainable and meeting the needs of the community
- meet people and build relationships with trustees, staff and other volunteers
- build on your governance, leadership and strategy skills
- increase your employability

And we'll reimburse expenses too.



## What do you need to have?

You'll need to:

- understand and accept the responsibilities and liabilities as trustees
- have professional financial qualifications and a previous broad experience of
- some knowledge or experience of charity finances, fundraising, financial consequences and pension schemes
- be non-judgmental and respect views, values and cultures that are different to your own
- have good listening, verbal and written communication skills
- be able to exercise good independent judgment and if necessary to make difficult recommendations
- excellent good numeracy skills to understand accounts
- be able to explain complex financial information in an accessible way
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
- be willing to undertake training in your role



## How much time do you need to give?

Trustee boards usually meet in the evenings and you'll likely need to give a number of hours per month to this and you may need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally within the local Citizens Advice. We can be flexible about the time spent and how often you volunteer so come and talk to us.



## Valuing inclusion

Our volunteers come from a range of backgrounds and we particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black Asian Minority Ethnic (BAME) communities.

If you are interested in becoming a trustee and would like to discuss flexibility around location, time, 'what you will do' and how we can support you please contact us.



## Contact details

1 Acland Road  
Dorchester  
Dorset  
DT1 1JW

Tel: 01305 269051

Email: [judith.maconochie@centralca.org.uk](mailto:judith.maconochie@centralca.org.uk) (Chair of Peoples' Committee)