



Trustee Treasurer

Job pack

Thanks for your interest in volunteering at Citizens Advice East Berkshire. This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Our values
- Things you should know about us
- Overview of Citizens Advice and Citizens East Berkshire
- The role profile and personal specification

Want to chat about this role?

If you want to chat about the role further, you can contact recruitment@caeb.org.uk to arrange a call.

**We are
Citizens Advice**

**We are
the people's
champion**

Our mission and values

Our mission is to provide trusted advice at times of change to:

Provide advice fit for the future - be there for people when they need us in the ways that help make the biggest impact.

Close the gap - end the disparities in access and experience for marginalised people.

Take early action – prevent more people reaching crisis by addressing problems early.

Our Values are:

- Empowering - we are proud to help clients to understand and exercise their rights and responsibilities.
- To provide the best advice – we provide, consistent, high quality, independent advice.
- Inclusive and flexible – we adapt to the changing needs of our clients and society, promoting access to those in greatest need whilst challenging discrimination.
- Open - we are impartial, non-judgmental, act with integrity and learn from feedback.
- One team – of staff and volunteers working together and developing our services with our clients at the forefront of our minds.



How Citizens Advice works

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 240 local Citizens Advice members.

This role sits within this network of independent charities, delivering services from:

- over 1,600 locations across England and Wales

with

- 8843 staff

and

- 14,000 trained volunteers

84% of people using our local services would recommend us to a friend.

No one else sees so many people with so many different kinds of problems, and that gives us a unique insight into the challenges people are facing today.

Citizens Advice East Berkshire

Serves a population of 435,000 residents living in the areas of:

- Bracknell Forest
- Royal Borough of Windsor and Maidenhead
- Slough

We have offices or outreach services across East Berkshire.

We deliver our service through

- Phone
- Drop in
- Outreach and referral

Our 2023/4 Annual Report has just been published and can be found [here](#).



Citizens Advice East Berkshire – Key Headlines for 2023 /24



Our income was £801,615



We have 25 staff and 60 volunteers



We helped 6,013 people



With 30,966 issues



We gained £2,582,654 back for clients through assisting them to gain their rightful benefits and helping them write off debts.



Most of the people we advised had problems with benefits, debt and housing issues.



Our clients are very diverse and many of the people we advise have disabilities or long-term health challenges.

The role

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, 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
- 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 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.

Person specification

You'll need to

- Understand and accept the responsibilities and liabilities as trustees
- Have financial qualifications or experience
- 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 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.

If you would like a job application form, please email
recruitment@caeb.org.uk