

Recruitment pack – Treasurer

February 2023



Thank you for your interest in applying to be the treasurer of Citizens Advice Bath and North East Somerset. This pack will give you everything you need to know to apply for this role and what it means to be a trustee.

In this pack you'll find:

Citizens Advice values

Three things you should know about the Citizens Advice service

Overview of Citizens Advice and Citizens Advice Bath and North East Somerset

The role of a trustee

Citizens Advice values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

Three things you should know about the Citizens Advice service

1. We're local and we're national. We have 6 national offices and offer direct support to people in around 250 independent local Citizens Advice services across England and Wales.

2. We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

3. We're listened to - and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

Overview of Citizens Advice

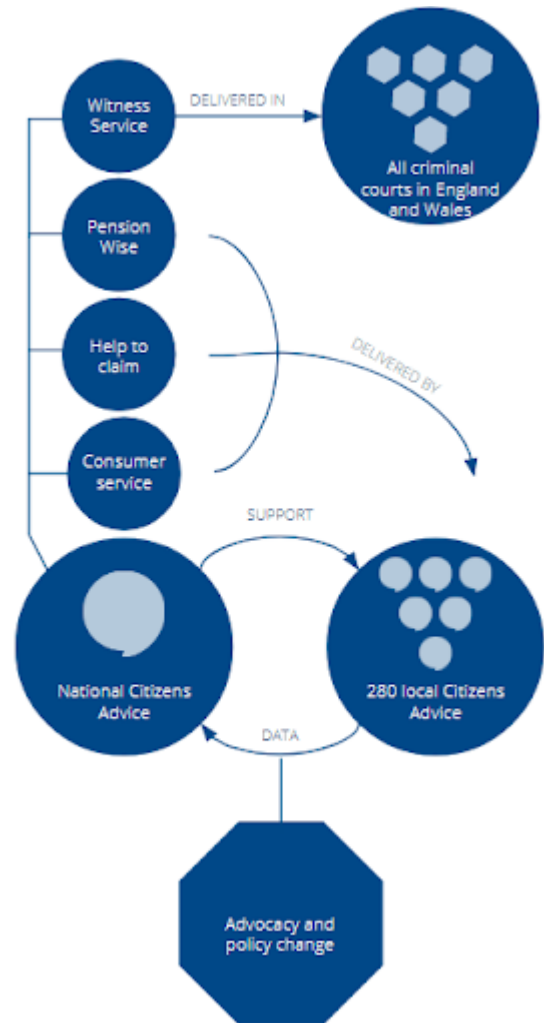
The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 260 local Citizens Advice members.

This role sits within our network of independent charities, delivering services from over 600 local Citizens Advice outlets over 1,800 community centres, GPs' surgeries and prisons

They do this with:

6,500 local staff
over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



About Citizens Advice Bath and North East Somerset

Citizens Advice Bath and North East Somerset is an independent local charity providing information and advice to residents of the BANES council area. We aim to empower people to resolve their problems and change their lives for the better. We are a member of the national Citizens Advice network of local advice agencies. We provide free, independent and confidential advice. We help people overcome their problems and campaign on big issues when their voices need to be heard. We value diversity, champion equality, and challenge discrimination and harassment.

We're here for everyone in the Bath and NE Somerset area and we work in partnership with other local services to provide the best possible advice and information to meet the needs of local residents. We offer information and generalist advice on any issue and specialist benefits and debt advice. We also offer specialist legal advice delivered by professionals acting on a pro bono basis.

We are gradually opening up our services following the Covid pandemic, though most initial contact with clients is still by phone. Details of all our advice services are on our website – www.citizensadvicebanes.org.uk

We have 25 paid staff, though we use volunteers to deliver most of our advice services and for a variety of support roles. As well as giving advice we aim to prevent the problems that affect people's lives – we collect evidence of practices and policies that cause the issues we help with; our knowledge of clients' problems and circumstances enable us to campaign for change to get a fairer deal for everyone. For more information about our services and impact, please see the [2021 annual report](#).

About the trustee board

The treasurer will join our trustee board, which has overall control of the charity and are responsible for making sure it is doing what it was set up to do. Trustees decide the overall strategic direction of the organisation and ensure that staff and volunteers are working towards key strategic objectives. The CEO is head of paid staff and reports to the board. There is guidance on involves on what is involved in being a trustee on the [Charity Commission website](#).

There are currently nine trustees – some have served for many years, while some have joined recently. The board currently meets quarterly, during office hours. As well as the main board there is a number of sub-groups, some permanent, some task and finish groups. The treasurer will lead the finance sub-committee, which reports to the main board.



What will you do?

In addition to being a trustee of the organisation, the treasurer will:

complete an introduction for your role

maintain an awareness of how the local Citizens Advice is operating

read papers for board meetings and attend four meetings per year in addition to leading on finance sub-committee meetings to discuss finances in more detail

explain, guide and advise the board on the key assumptions and financial implications of our budgets, operational and strategic plans

ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services' needs

Support the finance officer to explain, guide and advise us 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

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 the 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 the Chief Officer and Finance Officer to give information and advice on financial matters

Work with other trustees and staff to further our strategic objectives, 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 any expenses too.



What do you need to have?

You don't need specific qualifications or skills but you'll need to:

- understand and accept the responsibilities and liabilities as trustees
- 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
- have good numeracy skills to understand accounts with the support of the treasurer
- 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
- 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



How much time do you need to give?

The trustee board currently meets during office hours and you'll likely need to give 2-3 hours, 4 times a year and you may need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally. We can be flexible about the time spent and how often you volunteer.



Valuing inclusion

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



Contact us

If you are interested in becoming a trustee and would like to find out more, please email our CEO simon.lawson@cab-banes.org to arrange a conversation by phone, or video call.

To apply

The recruitment pack, advert and application form are on [our website](#). Please complete the application and return it to the address on the form.

There is no closing date for applications – we will shortlist and interview suitable candidates, as and when they apply. The role will close when a candidate is appointed.

Citizens Advice Bath and North East Somerset is the operating name of Bath and District Citizens Advice Bureau, a registered charity and company limited by guarantee. Charity Registration Number: 1025392; Company Registration Number: 2845028 England; Registered office: 2 Edgar Buildings, Bath, BA1 2EE; Financial Conduct Authority Number: 617504