

# Trustees

## 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 (\*insert number of\*) meetings per year
- work on specific projects with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice
- 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
  - monitor the financial position of the local Citizens Advice ensuring that it operates within its means and objectives, ensuring that there are clear
  - 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
  - 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
  - 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 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



## How much time do you need to give?

Trustee boards usually meet in the evenings and you'll likely need to give [insert number of hours / frequency] 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

Please contact Karen Evans on 015394 47185 for further details or email [manager@southlakesca.org.uk](mailto:manager@southlakesca.org.uk) or look on our website for available opportunities <https://www.southlakescab.org.uk/>