



## Becoming a Trustee

Thank you for your interest in becoming a Trustee with Citizens Advice Cheshire West. This information pack should provide you with useful and important information about our organisation and what it means to be one of our Trustees.

### Citizens Advice Cheshire West Aims

- **To ensure the right advice for everyone**, ensuring people do not suffer because they do not understand their rights and responsibilities, or because they are unable to express their needs effectively.
- **To improve the policies and practices that affect people's lives** by campaigning about issues that affect our clients and influencing decision-makers locally and nationally.

#### Our vision

- To be THE go-to charity for advice & support in Cheshire West

#### Our mission

- We advise, support and empower people to improve their lives
- We are accessible and known to all for the best, impartial advice
- We influence policy for a more equal and inclusive society

#### Our values

- We care about what we do and the people we work with
- We champion justice, fairness and equality
- We adapt to keep pace with a changing world



## What skills/experience do you need to have?

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 judgement 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



## What's in it for you?

- Make a positive impact for local people by ensuring Citizens Advice Cheshire West is sustainable and able to meet the needs of the community.
- Build relationships with staff, volunteers and other trustees.
- Build on your governance, leadership and strategy skills.
- Increase your employability.

And we'll reimburse expenses too.

# Citizens Advice Service

The Citizens Advice service is made up of national Citizens Advice and a network of around 290 local Citizens Advice members.

## The Citizens Advice service is based on four principles:

- **Independent** - We will always act in the interests of our clients, without influence from outside bodies
- **Impartial** - We don't judge our clients or make assumptions about them. Our service is open to everyone and we treat everyone equally.
- **Confidential** - We won't pass anything on what a client tells us, or even the fact they have visited, without permission.
- **Free** - No client has to pay for any part of the service we provide.

We **help resolve people's problems** by accessing a large electronic information system to ensure our clients are given accurate, up-to-date information on their rights and responsibilities. We also aim to **change policies and practices that affect our clients**, and we call this **Research and Campaigns**.

# What does Citizens Advice Cheshire West do?

Citizens Advice Cheshire West provides general and specialist legal help to everyone in the Cheshire West area.



We give advice to **help people overcome the problems they face**, in areas such as benefits, debt, employment, housing, relationships and immigration.



We use our knowledge about our clients' problems to identify trends and campaign to **improve the policies and practices** that affect people's lives.



We have **specialist services** including money advice, welfare rights, and mental health advocacy.



Our local service has over **80 trained volunteers and paid staff**. We deal with over **15,000 clients each year**, via face to face interviews, over the telephone and through email & webchat.

Our aim is to provide **“impartial advice to everyone on their rights and responsibilities”**, irrespective of who they are and what background they are from. We encourage all staff and volunteers to **welcome diversity**, to respect the individuality of each person and value their contributions.

Everyone that uses or needs our service needs to know that we are **free, impartial, confidential and independent**. We want people to feel comfortable using our service, know that they can get advice when they need it and receive a good service that meets their needs.



## What does a treasurer have to do?

The Treasurer is a member of the board of trustees with specific responsibilities to support and advise the board in safeguarding the company's financial well-being, ensuring its long-term success. You will have the knowledge, experience and skill to closely monitor the charity's financial position and financial controls, guide financial strategies and oversee the auditing and approval of the annual accounts. In doing so you will contribute to maintaining the organisation's stability and growth.



## What will you do?

- complete an introduction for your role
- maintain an awareness of how the CACW is operating
- read papers for board meetings and attend board meetings (usually five meetings per year)
- explain, guide and advise the board on the key assumptions and financial implications of the CACW's budgets, operational and strategic plans
- ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services' needs
- support any paid finance officer to explain, guide and advise CACW on the approval of budgets, accounts and financial statements with the organisation's framework
- 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 organisation
  - 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 CACW's finances and supporting financial control systems 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 ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management
  - review the board's own work and how effectively it operates including action for improvement



## How much time do you need to give?

Trustee boards usually meet in the evenings for two hours between five and seven times a year.

You will need to give time to read board papers in advance of board meetings, as well as time to meet the specific responsibilities of the Treasurer role.

You may need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally. We ask trustees to also attend one full day per year for board development.



## 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 and how we can support you, please contact us.



## Contact details

If you would like to discuss the role further please contact Nicki Berg, Head of People:

By email: [nicola.berg@citizensadvicecw.org.uk](mailto:nicola.berg@citizensadvicecw.org.uk)

By phone: 01606 668925

(Unavailable between 20 June and 07 July 2024)

Or for further information please contact us by email  
[admin@citizensadvicecw.org.uk](mailto:admin@citizensadvicecw.org.uk)



## To apply

The closing date for applications is **19th July 2024** and interviews are likely to be held week commencing **5th August 2024**.

To apply, please submit an application form. The application form can be accessed <https://www.citizensadvicecw.org.uk/become-a-trustee/>