



# Chair of trustees

## Local Citizens Advice Overview

- Bridgend Local Citizens Advice, one of a nation wide network of Local Advice offices throughout the UK, provides free, impartial and confidential advice to the population of the town of Bridgend in South Wales and the surrounding areas.
- Advice services related to a range of key issues, including Debt, Benefits and Homelessness, are provided at the local office and outreaches, both face to face and by a range of other channels.
- Governance of the operations of the office is provided by a Board of volunteer Trustees responsible for overseeing a direction of travel for the organisation and ensuring standards are maintained at all times.
- A key board member is the Treasurer who is responsible for overseeing financial operations, and ensuring that fellow trustees can be confident that the Charity's finances are used in the correct fashion and that the financial position of the organisation is secure



## What will you do?

- complete an introduction for your role
- maintain an awareness of how the local Citizens Advice is operating
- plan the board meetings including the dates and the agenda, with the Company / Charity Secretary and the Chief Officer
- read papers for board meetings and attend (\*insert number of\*) meetings per year

- facilitate the trustee board meetings by leading the meeting, ensuring that agenda items are discussed, enabling all members to contribute their views and take part and seeking clarification where necessary
- ensure that decisions and actions taken at board meetings are carried out
- ensure that the board decisions are made within the remit of the Citizens Advice membership agreement, governing documents and policies
- monitor attendance and commitment of all trustees
- provide or arrange for training or support for trustees if needed
- with other trustees and the Chief Officer, recruit a trustee board with a diverse range of skills, experience and knowledge with an aim to promote trusteeship to underrepresented groups that represent the local community
- ensure that all trustees receive an induction and the training needed for them to fulfil their role
- be proactive in recruiting successors to key positions such as Chair, Treasurer etc.
- arrange or provide support and supervision for the Chief Officer including an annual appraisal
- together with the Treasurer, ensure proper management and control of local Citizens Advice finances
- together with the Chief Officer, represent the local Citizens Advice in relationships with funders or potential funders, local events and in the community
- work together with all trustees and ensure that the board is able 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 lines of accountability for day to day financial management
  - monitor whether the Citizens Advice service complies with its governing document and meets the required standards
  - 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
- work on specific projects to further the strategic objectives of the local Citizens Advice



## 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 the type of work undertaken by a local Citizens Advice
- understand and accept the responsibilities and liabilities as trustees
- be non-judgmental and respect views, values and cultures that are different to your own
- a good basis of leadership skills
- ability to facilitate and lead meetings
- good interpersonal skills
- 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