



Role Description- Treasurer Trustee

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 as Treasurer?

See also the general Trustee role description

- Attend 8+ Board meetings per year, as well as leading at Strategy and Finance Committee meetings to discuss finances in more detail.
- Supporting any employed Finance Officer to 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

- 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 appropriate deadline to the Charity Commission and/or Registrar of Companies,
 - and make arrangements for them to be audited or independently examined as required.
- 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
- work with Citizens Advice staff, such as the Chief Officer or Finance Officer to give information and advice on financial matters
- As a Trustee you will have a general responsibility to take an active role 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 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.
 - 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

What do you need to have?

As a Trustee 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 and if necessary to make difficult recommendations

In addition as a Treasurer you'll need to have :-

- A strong background in finance
- a good understanding of the principles of sound financial management and strategic planning are essential
- some knowledge or experience of charity finances, fundraising, financial consequences and pension schemes would be useful
- 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?

Trustee boards usually meet in the evenings and you'll likely need to give up to 10 hours/month. 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.

What's in it for you

- make a positive impact in your local area by ensuring that 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.
- appropriate expenses will be paid



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 trustee lead for research and campaigns and would like to discuss flexibility around location, time, 'what you will do' and how we can support you please contact us.



Contact details

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(Chair of Trustee Board)