

Trustee Pack

Thanks for your interest in becoming a Trustee with Citizens Advice Rushmoor. This pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In the pack you'll find:

- Our values
- 3 things you should know about us
- Overview of Citizens Advice and Citizens Advice Rushmoor
- The role profile and specification
- Next steps

Want to chat about this role?

If you want to chat about the role further, you can contact Andrew Levey, our Trustee Board Chair, by calling 01252 986 224 or by emailing andrew.al@citizensadvicerrushmoor.org.uk

Our 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.



3 things you should know about the Citizens Advice Service

1. We're local and we're national. Our national offices, based in 6 locations, provide direct support to us in Citizens Advice Rushmoor – we are one of 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.



How Citizens Advice Rushmoor works

Citizens Advice Rushmoor is a local independent charity, committed to meeting the needs of our diverse community. With around 50 volunteers, and 36 paid staff, we respond to around 9,000 unique clients each year, generating over 29,000 different advice issues.

We deliver our service through as many different channels as we can, to make sure we are accessible to everyone. Our primary contact is by phone, as our service delivery model has changed since the pandemic; as well as offering webchat, email, outreach and in person help at our premises in Farnborough and Aldershot.

We run a lot of different projects, to help meet community needs, ranging in size and focus, and have won national awards for our work, including the "Championing Equality" award, for the Nepali language services we deliver; and in 2022 shared the national "Best Partnership Working" award for our Reaching People Together project.

Our Heathlands service, which specialises in delivering casework for clients with serious mental illness, leads the way for wider Citizens Advice developments in mental health; and we are one of 16 national delivery centres for the highly regarded Pension Wise service.

Our Trustee Board takes overall responsibility for our organisational direction and focus. Click here for our [Annual Review](#) – with plenty of other information about us, our news, our Trustees, and our services on www.citizensadvice.rushmoor.org.uk

Overview of the national Citizens Advice Service

The Citizens Advice service is made up of the national Citizens Advice charity, and a network of around 250 local Citizens Advice members.

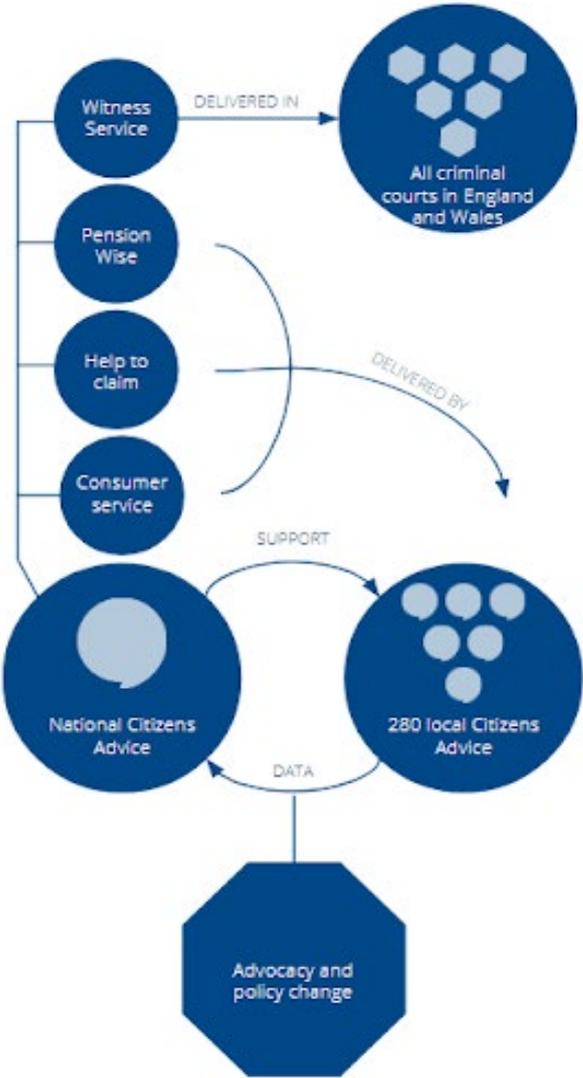
Together, the network of independent charities, delivers services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs’ surgeries and prisons

Nationally this includes

- over 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.





The role



What will you do?

- Complete Trustee induction, including mandatory training modules
- Become a director of the charity and company
- Develop and maintain an awareness and oversight of how Citizens Advice Rushmoor operates
- Read papers for and attend 8 Board meetings per year, along with an annual strategy day. Some roles also require attendance to quarterly committee meetings
- Monitor Citizen Advice Rushmoor's income and expenditure position and, in conjunction with the Finance Manager, present accessible reports quarterly to ensure the Board understands the accounts and any financial implications
- Explain, guide and advise the Board on the key assumptions and financial implications of Citizens Advice Rushmoor's budgets, operational and strategic plans
- Support the Finance Manager and Chief Officer to explain, guide and advise on the approval of budgets and financial reporting
- Ensure that Citizens Advice Rushmoor has an appropriate reserves policy and a realistic budget that meets the service's needs
- Ensure that annual financial statements are prepared and audited in compliance with SORP (Statement of Recommended Practice) Accounting for Charities and submitted by the deadline to the Charity Commission and Registrar of Companies
- Present the financial statement accounts at the Annual General Meeting (AGM) in an accessible way for volunteers, staff and other stakeholders
- Keep the Board informed about its financial duties and responsibilities
- Understand the accounting procedures and key internal controls to assure the Board that the charity's financial integrity is sound
- Work together with other Trustees or staff to deliver our strategic objectives, business plans and legal and regulatory requirements
- Take an active role during and between Board meetings, working with other Trustees and the operational team, on policy, strategic direction, performance, people and community
- Participate as a member of Citizens Advice Rushmoor's Executive Committee



What's in it for you?

The role will enable you to:

- Make a positive impact for people in your local area by ensuring the local Citizens Advice is meeting the needs of the community
- Contribute to the local Citizens Advice's sustainability and future resilience
- Meet people and build relationships with Trustees, staff and other volunteers
- Build on your governance, leadership, and strategy skills
- Increase your employability
- Our Trustee roles are voluntary



What do you need to have?

You'll need to:

- Understand and accept Trustee responsibilities
- Hold an accounting qualification or suitable financial management experience
- Some knowledge or experience of charity finances and accounting is desirable but not essential
- Work collaboratively, with strong communication and relationship management skills
- 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 explain financial information in an accessible way
- Be able to exercise good independent judgment and, if necessary, to make difficult recommendations
- Be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
- Be willing to undertake mandatory and discretionary training for your role



How much time do you need to give?

Our Trustee Board usually meets in the evenings, and you'll likely need to give an average of 4 hours per week to the role, including monthly meetings. You may need to attend other meetings if you're involved in specific projects or meet with volunteers and staff 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

Citizens Advice is a charity that believes in equity and diversity and believe that an inclusive and diverse Trustee Board will help us achieve our aims. 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.

Next steps

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, contact Andrew Levey, our Trustee Board Chair, by calling 01252 986 224 or by emailing andrew.al@citizensadvicerrushmoor.org.uk. To move straight to an application, send through your CV, including two referees.