

# Trustee Role Description

## What will you do?

The term 'trustee board' refers to the governing body of the local Citizens Advice service.

The board of trustees is collectively responsible for the governance of the local Citizens Advice service, including setting an overall vision. This can broadly be defined as:

- holding staff accountable, and being ultimately accountable for the activities of the local Citizens Advice service
- providing leadership to all in the Citizens Advice service
- developing policy
- strategic management

Each trustee is accountable for all the decisions taken by the trustee board, including those taken if they are absent. Once the trustee board has reached a decision, all individual members of the board are bound by it and must support it. No one trustee or group of trustees (e.g. a committee) has the authority to take decisions or decide policy unless the board has clearly delegated authority to them. The board should not rely on the advice of an individual trustee, such as the treasurer, as decisions are the collective responsibility of the whole board.

You will

- 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 CASTAD
  - monitor the financial position ensuring that CASTAD operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management
  - ensure that all the finances and supporting financial control systems of CASTAD 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 CASTAD's 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
  - 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

- maintain an awareness of how Citizens Advice St Albans District (CASTAD) is operating
- read papers for board meetings and attend 4 meetings per year
- work on specific projects with trustees or staff to further CASTAD's strategic objectives
- complete an introduction for your role



## 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, become part of a large team building relationships with other trustees, staff and 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?

Our Trustee Board meets in the evenings and you'll likely need to give 6 hours including three hours to read the papers, four times a year. You will also need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally within the local Citizens Advice. There will also be on-going training, so that you can develop

your knowledge & skills and become/remain compliant with the relevant governance frameworks. The training might be face to face or on-line. We can be flexible about the time spent and how often you volunteer so come and talk to us.

## Valuing inclusion

CASTAD recognises people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and wishes to encourage and harness these differences to make its services more relevant and accessible.

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

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