

**Treasurer – Trustee Board**

Citizens Advice Liverpool is seeking a dedicated and enthusiastic individual to join our Trustee Board as Treasurer. This is a fantastic opportunity to make a real difference to the lives of people in our community.

In addition to fulfilling the responsibilities of a Trustee, the Treasurer plays a vital role in overseeing Citizens Advice Liverpool’s financial matters. You will ensure that proper financial measures, controls and procedures are established and maintained and provide regular reports to the Board regarding the financial status of the organisation.

While previous governance experience is welcome, it is not essential. We provide a full induction and training to all our Trustees so if you have a passion for sound financial management and want to make a difference in your community, we encourage you to apply.



**What will you do**

**...as a Trustee**

* Maintain an awareness of how Citizens Advice Liverpool is operating
* Read papers for board meetings and attend 6 meetings per year
* Explain, guide and advise the board on the key assumptions and financial implications of Citizens Advice Liverpool’s budgets, operational and strategic plans
* 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 Citizens Advice Liverpool*
* *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 all the finances and supporting financial control systems of Citizens Advice Liverpool 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 of Citizens Advice Liverpool, ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day-to-day financial management*
* *review Citizens Advice Liverpool’s own work and how effectively it operates including action for improvement*

**...as a Treasurer**

**Financial Oversight and Strategy**

* Ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services’ needs
* Lead our Finance Sub Committee meetings, certain times a year to discuss finances in more detail
* Support any paid finance officer to explain, guide and advise Citizens Advice Liverpool on the approval of budgets, accounts and financial statements with the organisation’s framework
* Present accounts at the Annual General Meeting (AGM) in an accessible way for volunteers and paid staff
* 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 Liverpool 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 Citizens Advice Liverpool to further the strategic objectives of the organisation, including developing a fundraising strategy

**Financial Viability and Growth:**

* Monitor and advise the Board on the charity's financial viability.
* Take a proactive approach to ensure long-term sustainability.
* Maximise the charity's investments and assets to support its mission and growth within the Liverpool community.

**Risk Management:**

* Oversee the management of risk within the organisation

**Attributes and Qualities**

* Bring energy, enthusiasm and commitment to the role, broadening the diversity of thinking on Citizens Advice Liverpool’s board

 **What’s in it for you?**

* A chance to make a positive impact for people in your local area by ensuring Citizens Advice Liverpool is sustainable and meeting the needs of the community
* You will meet people and build relationships with Trustees, paid staff and other volunteers
* An opportunity to grow your governance, leadership and strategy skills
* Develop skills to increase your employability

And we’ll reimburse expenses too.

 **What do you need to have?**

You’ll need to:

* Understand and accept the responsibilities and liabilities as trustees
* Have financial qualifications or experience
* Possess a solid understanding of charity financial management in the UK which includes charity finances, fundraising, financial consequences and pension schemes
* Have the ability to analyse and interpret financial information effectively
* Be non-judgmental and respect views, values and cultures that are different to your own
* Have excellent communication and interpersonal skills
* Be able to exercise good independent judgment and if necessary to make difficult recommendations
* Excellent numeracy skills to understand accounts
* Be able to explain complex financial information in an accessible way which is clear and concise

Be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection

* Have a genuine passion for our mission of providing free, confidential, impartial and independent advice.



**How much time do you need to give?**

Trustee boards usually meet in the evenings, and you’ll likely need to give 4 hours per month and you may need to attend other meetings if you’re involved in specific projects, or meet with volunteers and staff occasionally within Citizens Advice Liverpool. We can be flexible about the time spent and how often you volunteer so come and talk to us.



**Valuing inclusion**

We are committed to developing a diverse and inclusive Board of Trustees that reflects the communities we serve. We believe that increasing the diversity of our board will enhance our ability to deliver meaningful and effective services.

We particularly encourage applications from people who are currently underrepresented on our board, including individuals from communities of colour, disabled people, those with physical or mental health conditions,

LGBTQIA+ people, and individuals with diverse gender identities. We welcome candidates from all socioeconomic backgrounds and value the perspectives and experiences they bring.



**Contact details**

For any questions or further information please contact **recruitment@caliverpool.org.uk**