



**citizens
advice**

**Derbyshire
Districts**

**Thanks for your interest in becoming
our Treasurer. This document should give
you everything you need to know
about the role.**

Treasurer Recruitment Pack

Welcome

A message from our Chair

Dorcas Bunton



Thank you for showing an interest in joining the Board of Trustees here at Citizens Advice Derbyshire Districts. If you take the next step and submit an application you would be applying to join an organisation that is committed to supporting individuals within its communities who may be at a point of crisis in their lives and need somewhere to turn, or require advice or support to guide them through what help financially or otherwise may be available to them. A vital service that has existed for over 85 years.

Our current Board is made up of people with varying backgrounds and skills. At our core though, along with all our staff and volunteers, is the desire to support individuals in their time of need. We work with, guide and support our very talented Senior Leadership Team, in developing the organisation, in increasing and creating funding streams that enable us to meet the challenge of increasing demand for our services.

It's a challenging and rewarding role to take on. Challenging because demand for our services increases daily but resources cannot keep up. Citizens Advice is so familiar to everyone that people forget it is a charity and reliant on raising funds through various means. Rewarding in that as well as witnessing our advisers and volunteers make such a difference to some people's lives, as a Board member you can help shape the organisation going forward and in doing so positively contribute to and support your community.

I hope we hear from you soon.

A message from our Treasurer

Terri Jones



Thank you for taking this step and thinking about joining the Board of CADD. We are looking for an ambitious and passionate Treasurer to join our Trustee Team at CADD. We are a local charity, funded by local and regional grants and contracts, working within the national network of Citizens Advice.

This is a rare opportunity to join CADD as a volunteer trustee and treasurer. This role will have a substantial and meaningful impact on our organisation – our new treasurer will play an important role in the oversight and strategic execution of our finances and governance during an exciting period of organisational development.

As a member of the Board of Trustees and as its treasurer, you will help ensure we deliver on our vision, purpose and values, as well as act in compliance with our governing document and the law. You will monitor the financial administration of the charity and chair the board's Finance Sub Committee.

I have found being a treasurer an exciting and rewarding experience. Exciting, because the organisation is constantly evolving as the funding landscape changes to meet the myriad issues our clients are facing. Rewarding, as I have been very pleased to be part of an organisation that genuinely makes a difference to people's lives day in day out and to work with a Board and Senior Management team who share this enthusiasm.

I hope that you will consider joining our team.

About us

Citizens Advice Derbyshire Districts is a **local independent charity** that forms part of the national network of Citizens Advice.

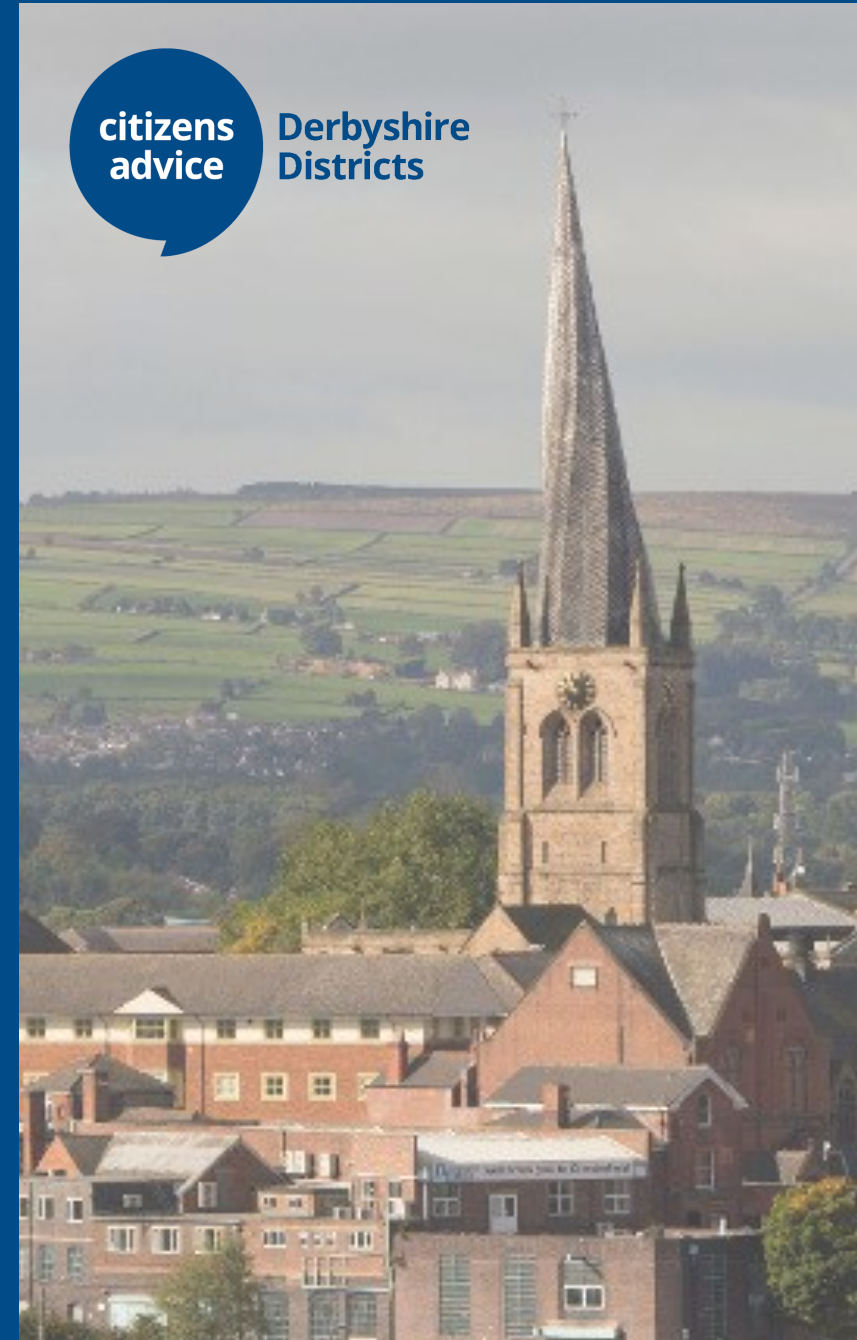
Our first office opened in Glossop in 1939 and we've been tirelessly working across the local community to help people ever since – **whoever they are and whatever their problem**. From benefits, housing, employment and consumer to debt, relationships, energy costs and more.

Our primary areas of focus are in **Amber Valley, Chesterfield, Derbyshire Dales, Erewash** and **High Peak**. Although we also provide some funded services across the East Midlands, and nationally through the Citizens Advice network.

We pride ourselves on being a **great place to work and volunteer**, we currently have 100 paid staff members, over 60 volunteers and 14 trustees.

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Our strategy

As a trustee, part of your role involves helping to **shape the long term future** of Citizens Advice Derbyshire Districts.

Our five year strategy is developed by our Board of Trustees and Senior Leadership Team, and it helps to set out the **goals** and **strategic objectives** which **influence** our annual operational business plan and **day to day activities**.

Our three main strategic objectives define our **organisational priorities, who we are, and what we do**.

Clients and Services

We will resource and deliver our services at a scale and intensity proportionate to the degree of need, ensuring we remain responsive to emerging trends. We will continue to drive performance through our Adviceline, whilst sustaining targeted face to face support for the most vulnerable.

Organisational Sustainability

We will maintain an agile leadership team which will enable us to seek out new opportunities and continue to curate a broad spectrum of funding for core advice services and targeted support projects. We will actively seek out new ways to engage and collaborate with key stakeholders and partner agencies that align with our values.

People and Culture

We will continue to be a high-quality organisation that values our people and consistently strives to be considered a great place to work and volunteer. We will continue to develop a culture of positivity, built on championing equity, diversity, inclusivity, and harmony in the workplace.

Our impact in 24/25



24,192
people helped



172,662
issues dealt with



18,041
Adviceline calls
answered



£31.5 million
income gained



£6.8 million
debts resolved

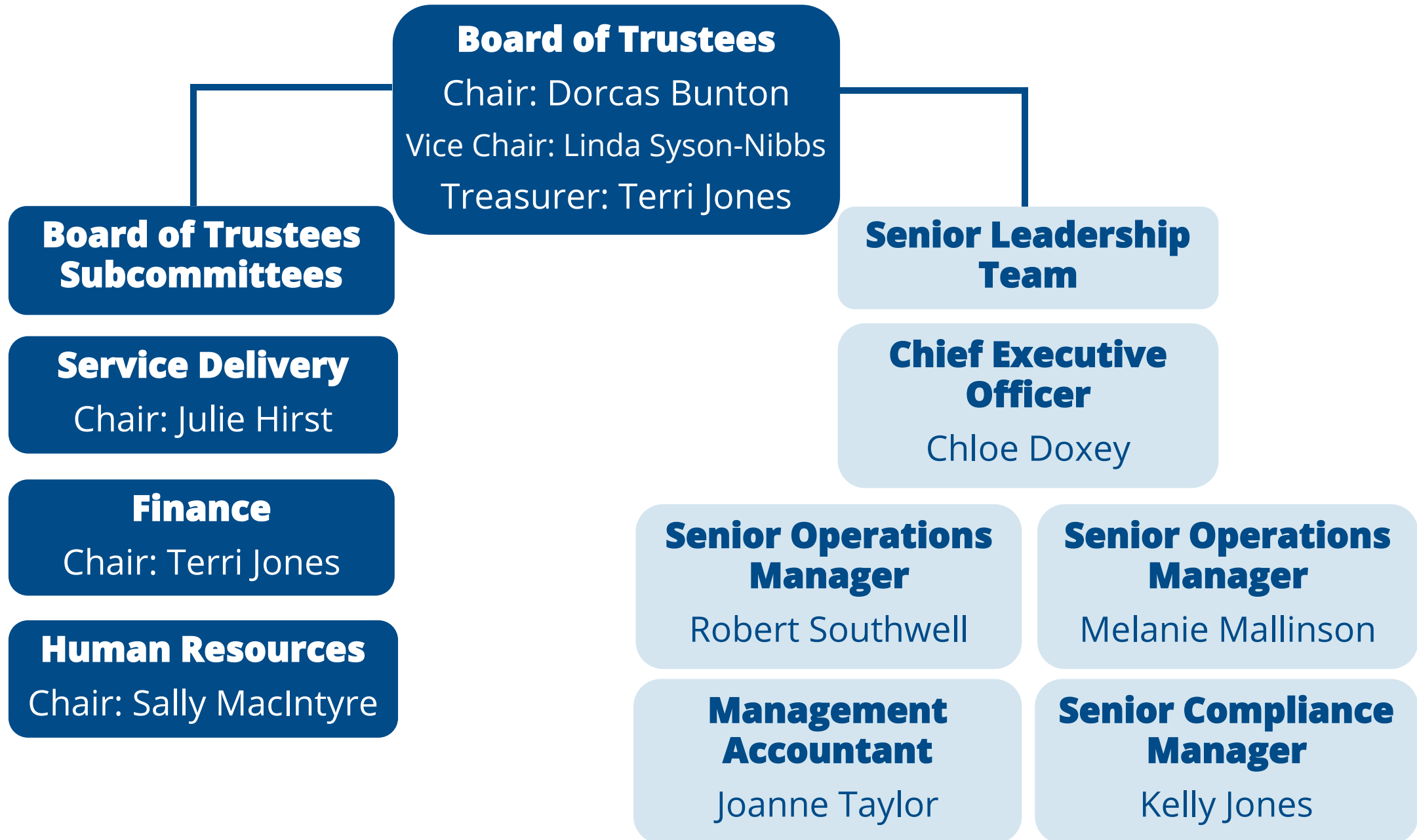


**Thank you for
everything you
have done for my
husband and I,
your help has been
invaluable**

- client



Governance structure



Our subcommittees

Service Delivery

Aligned with our 'clients and services' strategic objective, our Service Delivery Subcommittee monitors things such as:

- Organisational performance
- Project design, development and delivery
- Outcomes and outputs
- Accessibility of services
- Client satisfaction

Finance

Aligned with our 'organisational sustainability' strategic objective, our Finance Subcommittee monitors things such as:

- Management accounts and budgets
- Financial procedures and risk
- IT, cyber security and technology
- Reserves and cashflow
- Fund raising

Human Resources

Aligned with our 'People and culture' strategic objective, our Human Resources Subcommittee monitors things such as:

- People management
- Equity, Diversity and Inclusivity (EDI)
- Health and safety
- Recruitment and retention
- Training and development

EDI Steering Group

The group is made up of trustees, staff and volunteer EDI champions. The group makes recommendations to the Human Resources Subcommittee on things such as:

- EDI policies, procedures and processes
- Accreditations, schemes and programmes
- Updates on legislation and best practice
- Improvements to support staff, volunteers or clients

Trustee responsibilities

Our Board of Trustees is collectively responsible for the overall management, governance and strategic direction of the charity. This includes developing the organisation's strategy in accordance with governing documents, legal and regulatory guidelines. We are looking for people who can demonstrate the skills required to fulfil the fundamental responsibilities of a trustee, while bringing their own knowledge, perspective and lived experiences to the role.

Fundamental responsibilities of a trustee:

Setting strategy

Set the long-term vision and strategic direction of Citizens Advice Derbyshire Districts in the long term best interests of the service's clients.

Financial and performance oversight

Provide oversight of finances, risk, and performance, ensuring the long term sustainability of the charity and service.

Ensuring accountability

Being open to challenge and questioning from the wider organisation, listening and consulting as appropriate and ensuring strong accountability from the Senior Leadership Team.

Legal obligations

Ensuring that the charity complies with its charitable objects at all times, and with the law more generally.

Leadership

Building strong relationships with the Senior Leadership Team, staff, volunteers, National Citizens Advice, regulators and wider stakeholders. Demonstrating Citizens Advice values in behaviour and decisions.

Setting and ensuring standards

Upholding the Membership Agreement by ensuring the performance quality frameworks hold the organisation to high standards and all regulations and standards are met.

Equity, Diversity and Inclusion (EDI)

Ensure all decision-making is informed by principles of equity, diversity and inclusion and ensuring our work is informed by diverse voices and lived experiences.

Treasurer responsibilities

Chair the Finance Subcommittee

Lead the Finance Subcommittee in governing all financial aspects of the organisation and make recommendations to the board, keeping them informed about their financial duties and responsibilities.

Support the Senior Leadership Team

Work with the Senior Leadership Team, including the Management Accountant, to give information, advice and guidance on financial implications of the organisation's budgets, operational and strategic plans.

Risk management

In conjunction with the Board of Trustees and Senior Leadership Team, identify, assess and mitigate potential risks to protect the organisation's financial health.

Financial procedures and controls

Ensure the organisation's financial procedures, including the reserves policy, are kept relevant and in line with regulations. Lead on key internal controls, to be able to assure the board of the organisation's financial integrity.

Statutory compliance

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 Companies House. Make arrangements for the accounts to be audited and presented at the Annual General Meeting.

Reporting

Oversee compliance with reporting requirements including quarterly review of income and expenditure position and ensure accessible information is presented to the board.

Budget planning

Support the Senior Leadership Team in setting and managing the organisation's annual budget to ensure it's realistic and meets the services' needs.

Banking

Act as a signatory on designated bank accounts that require governance approval and ensure appropriate management of accounts and balances.

What's in it for you

Being a trustee is a volunteer role, so it is important that you feel the benefit of giving away your time, knowledge and skills for free. These are just some of the benefits of becoming a trustee with us:

Use your skills to make a difference

Make a positive impact for people in your local communities by ensuring Citizens Advice Derbyshire Districts is the best organisation that it can be.

Learn new skills

Build on your leadership, strategy, finance and governance skills. Learn from other trustees and our experienced Senior Leadership Team.

Meet new people

You'll get to build relationships with the other trustees, as well as our Senior Leadership Team, and our wider team of staff and volunteers.

Influence change for everyone

Equity, diversity and inclusion (EDI) is integral to all we do as a service, not only for the people we help, but also for our volunteers, staff and trustees. We are constantly evolving as an organisation and your perspective and lived experience could help to influence positive change.



Who we are looking for

Your knowledge and experience

- Have financial qualifications and/or experience
- Awareness of charity governance best practice and the role and responsibilities of a treasurer
- Experience of financial strategy development and/or performance and impact monitoring
- Knowledge/experience of financial risk assurance
- Ability to apply experience between sectors - e.g. from private or public sector into charitable sector
- Experience of working in or with diverse and/or rural communities
- Have a connection to the local area and understanding of the issues our clients are likely to come to us for advice with

Your skills, abilities and personal qualities

- Have excellent numeracy skills in order to be able to understand and explain financial accounts
- Ability to annotate, explain and present complex financial information in an accessible way
- Commitment to our strategic aims and values, with an appreciation of the challenges our clients face
- Strong interpersonal skills and the ability to work collaboratively and constructively in a governance setting
- Integrity, authenticity and the ability to act impartially and fairly at all times
- Proficient IT skills

To ensure our board is reflective and representative of our local communities and workforce, we strongly encourage applications from under-represented communities. Currently we are particularly seeking to increase the involvement of people under the age of 35, people with a disability, people of colour and/or LGBT+ people on our Board.

Terms of appointment

Time Commitment

The Treasurer is expected to contribute between 15 and 20 days per year. This will include:

- Trustee Board meetings of which there are typically four a year, together with one strategic leadership day. These meetings are held in person, though online attendance may be possible.
- Chairing the Finance Subcommittee, which meet four times a year.
- Financial meetings to carry out Treasurer duties such a budget planning, statutory account preparation and bank reconciliations.
- Additional ad hoc meetings and organisational events as required.

Location of meetings

Trustees must be willing to travel to attend the in person meetings, which are typically held in our Matlock Office located at the Town Hall. Meetings are usually held in the evenings between 4pm-6pm. Expenses will be paid.

Training requirements

All trustees are required to commit to a mandatory online training plan including annual refresher training. This includes Data Protection, Cyber Security, Senior Managers and Certification Regime, EDI, safeguarding, preventing sexual harassment and health and safety.



How to apply

We hope you will consider making an application to become our Treasurer at Citizens Advice Derbyshire Districts.

To apply, please complete the online form found on our website here: [**\[citizensadvice.derbyshiredistricts.org.uk/trustee/\]\(https://citizensadvice.derbyshiredistricts.org.uk/trustee/\)**](https://citizensadvice.derbyshiredistricts.org.uk/trustee/)

If you would like to talk to someone informally about the role before making an application, please email us at: **governance@ddcab.org.uk**

If you have a disability and identify any barriers in the role description, person specification or application process, please tell us.

We would also be grateful if you would complete the diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

Closing date: When a suitable candidate is found
Interview date: TBC

