

Trustee Job Description (Finance Background)

Job Title: Trustee of Citizens Advice Manchester

Department/Section: Board & Finance, Risk and Audit Committee

Reports to: Trustee Board & Chair of Trustees

Salary: None - unpaid volunteer basis due to legal requirements

Monthly Hours: approx 10-15 hours, after 16:30 Mon-Fri, 2/3rds remotely

Main Purpose of Role:

Your community needs you, and by joining CAM, you can help give-back!

We are looking for volunteers with a background in Finance to join our Board of Trustees.

Full training and support will be provided to help bring you up-to-speed.

Citizens Advice Manchester (CAM) is one of the largest and leading charities that forms part of the "Citizens Advice" network. CAM is an independent charity which delivers both local and national support services, funded by Citizens Advice and central government, Manchester City Council and private sector organisations.

Citizens Advice Manchester have an annual budget of £7.5m and employ around 200 paid staff to deliver our services, with our main office in central Manchester and services provided in community locations around Manchester and directly from our Mobile Advice Unit van.

In 2023, CAM offered direct support to over 42,000 clients with more than 160,000 issues. Our clients achieved more than £8 million of financial gains. We helped clients manage over £6.2 million of debt, provided 979 fuel vouchers for local residents and helped 495 people threatened with homelessness to stay in their home.

Your role as a Trustee of CAM is to provide input into the direction of the organisation in order to make sure that CAM continues to achieve its charitable aims, by using your own unique experience and skills, as well as participating in Finance, Risk & Audit Committee meetings, which "deep dive" into finance and risk matters.

If you would like to know more about the role of a trustee, take a look at these resources:

- <https://reachvolunteering.org.uk/guide/become-trustee>
- <https://youngtrusteesmovement.org/benefits>

This is an opportunity to make a long-term contribution to a great organisation that helps and supports people in Manchester and across the UK, as well as to build on your own governance, leadership, and strategy skills.

Being a Trustee is a voluntary role, but comes with responsibilities and obligations, and though we are looking for someone able to dedicate a portion of their time each month, we welcome all expressions of interest and offer an opportunity for an informal discussion.

[If you know someone who might be interested, please share the word and follow us on social media!](#)

- <https://www.linkedin.com/company/manchester-citizens-advice-bureau>
- <https://twitter.com/ManchesterCAB>
- <https://www.facebook.com/ManchesterCAB/>

Key Expectations:

- Availability to attend meetings usually between 4:30pm to 6:30pm
- Attend monthly Trustee Board meetings (2-5 hours per month)
- Attend bi-monthly Finance, Audit and Risk Committee meetings (2-5 hours)
- Attend away-days or training with reasonable expenses paid (1-2 days a year)
- Read papers in advance for Trustee Board and Committee meetings
- Support the CAM leadership team with your finance knowledge/experience
- Maintain awareness of how Citizens Advice Manchester is operating in line with contractual and funding requirements, offering advice and support to achieve charitable outcomes
- Maintain good governance of the charity in line with legal and contractual obligations, including the CAM Articles of Association and Charity Commission best practice

Essential and Desirable Skills/Knowledge/Experience:

As a Trustee, you don't need specific qualifications or experience to contribute to the organisation at Board level, however we are particularly interested in people with the following qualities:

- Understand and accept the responsibilities and liabilities of Trustees **(essential)**
- Non-judgmental and respectful of views, values and cultures that are different to your own **(essential)**
- Excellent listening, verbal and written communication skills **(essential)**
- Able to exercise good independent judgement **(essential)**
- Willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection **(essential)**
- Able to dedicate up to 10 hours a month of your time **(essential)**
- Knowledge or interest in financial or risk management best practice **(essential)**
- Practical experience in at least one of the following specialisms: budget management, risk management, project accounting, financial controls or financial accounting (desirable)
- Practical experience in operational management (desirable)
- Finance experience at mid/senior level (desirable)
- ACCA, ACA, CIMA or other related finance qualification (desirable)

Inclusion and Diversity

Our Trustees come from a range of backgrounds and we recognise the positive value of diversity, we promote equality and challenge unfair discrimination. We aim at all times to recruit the person who is most suited to the role and particularly welcome applications from people currently underrepresented within our organisation as we seek to represent the diverse communities that CAM serves.

Trustee Interview and Onboarding Process

1. Applicant responds to this advert and applies via our website (www.citizensadvicemanchester.org.uk/our-trustees).
2. Applicant completes a short application form, outlining what you could bring to the role of Trustee and provides their CV.
3. Applicant fills out Equalities Monitoring Form (not part of the selection process)
4. Informal telephone interview arranged with existing Trustee for two-way Q&A
5. Selection of second stage applications carried out by panel of Trustees
6. Successful Applicant invited to a 2nd stage interview with panel of Trustees
7. Offers made to successful applicants, documentation provided/completed
8. Applicant introduced to their nominated "Buddy Trustee" for support
9. Formal appointment of the applicant to the Board of Trustees
10. Trustee attends Trustee Onboarding Training