

Trustee Treasurer Job Pack

Thanks for your interest in volunteering at Citizens Advice Lewisham!

This job pack provides everything you need to know about applying for this role and what it means to work with Citizens Advice.

In this pack you'll find:

- Our mission and values
- An overview of Citizens Advice and Citizens Advice Lewisham
- The role profile and person specification
- How to apply for the role

A dark blue rectangular box containing the text 'We are Citizens Advice' in white, bold, sans-serif font.

**We are
Citizens Advice**

**We are
the people's
champion**

Our Mission and Values

At Citizens Advice, our mission is to provide trusted advice at times of change, ensuring our services are inclusive, accessible, and impactful. We focus on:

- **Providing advice fit for the future:** Being there for people when they need us most.
- **Closing the gap:** Addressing disparities in access and outcomes for marginalized people.
- **Taking early action:** Helping people before crisis develop.

Our values guide us:

- **Empowering:** Helping clients exercise their rights and responsibilities.
- **Delivering high-quality advice:** Providing independent, consistent support.
- **Inclusive and flexible:** Adapting to the needs of diverse clients.
- **Open and non-judgmental:** Acting with integrity and learning from feedback.
- **Collaborative:** Working as one team of staff and volunteers.



About Citizens Advice Lewisham

The charity Lewisham Citizens Advice Bureau is a member of the national Citizens Advice (CitA) organisation. We deliver free, impartial and confidential advice to those who live, work or study in the London borough of Lewisham Lewisham – Citizens Advice Lewisham ('CAL').

We are currently seeking a Trustee Treasurer to join our dynamic charity board. We are a highly engaged board who is passionate about ensuring our charity makes a big difference to Lewisham residents, especially to the most vulnerable people. We work in a collegiate way, respecting the diverse viewpoints board members bring to the table and hold ourselves to high professional standards.

At Citizens Advice Lewisham, we champion equality and strive to reflect Lewisham's diversity in all our appointments. We particularly encourage applications from people from ethnically diverse communities, Deaf and disabled people, members of the LGBTQ+ community, and individuals with lived experience of Lewisham's many and varied communities.

For more information, read our [Annual Report 2023/24 here](#)

Our Impact

23K

Lewisham Residents
Supported

£13.3M

Generated in financial
outcomes for clients

14K

Site Visits

The Role of Trustee Treasurer

As Trustee Treasurer, you will play a critical role in overseeing the financial integrity of Citizens Advice Lewisham, ensuring the organisation remains sustainable and impactful. You will work collaboratively with other trustees, staff, and volunteers to meet the needs of the community, while also understanding the impact and requirements of our national Citizens Advice, as it influences our finances and obligations.

Key Responsibilities

1. Financial Oversight:

Ensure proper financial records, controls and risk management are in place to safeguard resources

- Guide and advise the board on budgets, financial statements, and accounts within the organisation's framework.
- Explain financial reports to board members, ensuring they understand the accounts and their implications.
- Monitor income and expenditure, presenting accessible quarterly reports to the board.
- Ensure that proper financial records and controls are in place to safeguard resources.
- Verify that funds are spent for their intended purposes and provide reports to funders as required.
- Develop and review financial policies, including a reserves policy and budgets that meet the charity's needs. Recommend, review, and guide the development of the organisation's Business Plan and Annual Budget to ensure they are realistic and aligned with the charity's mission and objectives.
- Assess organisational risks and contribute to business continuity planning, ensuring that financial strategies support long-term stability.
- Oversee performance appraisals, recommending appropriate remuneration levels for key staff, in line with the charity's financial standing and strategic goals.

2. Compliance:

- Ensure annual accounts comply with the Charity Commission's SORP guidelines.
- Make arrangements for the accounts to be audited or independently examined as required.
- Submit annual accounts to the Charity Commission and/or Company's House on time.
- Present financial accounts at the AGM in a clear and accessible manner.
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3. Governance and Strategic Planning:

- Work with the board to set policies, define strategic goals, and evaluate performance.
- Contribute to the recruitment, retention, and turnover planning for staff and volunteers.
- Engage with stakeholders and participate in events to represent the financial health of the organisation.
- Understand and monitor the accounting procedures and internal controls to ensure sound financial integrity.

4. Community Engagement:

- Visit local offices or service sites to understand how the organisation operates and connect with staff and volunteers.
- Monitor how well services meet the needs of the local community.

5. Board Collaboration:

- Working with the CEO, oversee annual budgets and management accounts and report to the Board
- Lead on Board oversight of reporting to funders as/when required.
- Lead on Board review and implementation of financial policies, including reserves policy and other accounting policies
- Work collegially with trustees, respecting diverse viewpoints and fostering professional relationships.
- Take an active role in discussions during board meetings and finance sub-committee meetings.
- Support fundraising efforts and the development of a robust financial strategy.

What's in it for you?

- The opportunity to make a positive impact in your local area by ensuring our services are sustainable and effective.
- Develop governance, leadership, and financial skills.
- Build relationships with a team of passionate trustees, staff, and volunteers.
- Gain valuable experience that can enhance your career.

We will also reimburse expenses incurred in your role.

Person Specification

We're looking for someone who:

- Understands the responsibilities and liabilities of being a trustee.
 - Has financial qualifications or significant experience in financial management.
 - Can explain complex financial information clearly and accessibly.
 - Is committed to the aims and principles of Citizens Advice.
 - Demonstrates good judgment, communication skills, and the ability to contribute to strategic discussions.
 - Is non-judgmental and values inclusivity, respecting diverse views, cultures, and experiences.
 - We particularly encourage applications from individuals from ethnically diverse communities, Deaf and disabled people, members of the LGBTQ+ community, and those with lived experience of Lewisham's diverse and varied communities.
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Time Commitment

- **Board meetings:** Attend quarterly meetings in the evenings (2.5 hours plus preparation).
- **Finance sub-committee:** Chair quarterly meetings (1.5 hours plus preparation).
- **Additional engagement:** Attend an annual away day, occasional site visits, and stakeholder events.

We are flexible and can adapt the role to suit your availability.

How to Apply

Please send your CV and a cover letter outlining your suitability for the role to jobs@citizensadvicelewisham.org.uk
If you have questions or would like an informal discussion about the role, contact us to arrange a call.