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**Treasurer Recruitment 2020**

Dear Applicant,

I am delighted that you are interested in becoming a Treasurer for Citizens Advice Wandsworth.

We are a vital front line service embedded across Wandsworth. You can find us in our centre in Battersea Library and our new centre in Roehampton University. We deliver outreach services in locations including Tooting Library and St Georges Hospital. You can also access our services by phone or online. And we work in local partnerships including with Wandsworth GP’s, Foodbanks and many local community organisations. We pride ourselves on the relationships we have with our partners and the role we play in our community. To find out more about the range of help we provide, please visit our website [www.cawandsworth.org](http://www.cawandsworth.org).

Within this pack you will find further information about the charity, plus a Trustee role description and person specification. Our latest Annual Review and Prospectus and summary Business and Development Plan are available on our web site: <https://cawandsworth.org/about-us/>. Our latest accounts are published on the Charities Commission web site: [www.gov.uk/government/organisations/charity-commission](http://www.gov.uk/government/organisations/charity-commission)

To find out more about the post or to have a confidential discussion about the role with the Chair of Trustees please email recruitment@cawandsworth.org with your contact details and daytime availability.

*I wish you all the best in your application*

Lucy Harmer

Chair Citizens Advice Wandsworth.



**Background Information**

The Trustee Board of Citizens Advice Wandsworth (CAW) is looking for new Treasurer. Our existing treasurer has served for the past four years and is now looking to retire from the Board for personal reasons. We are looking for someone with a finance / accountancy background and an interest in becoming our Treasurer when the current postholder steps down in the next few months 2020. We are also keen to increase the diversity of our Board to reflect the community we support, and would welcome applications from people with lived experience of the issues we help resolve, and people from Black Asian Minority Ethnic (BAME) communities in particular.

CAW is a well-respected part of the Citizens Advice network. We operate from two centres in the London Borough of Wandsworth and have a strong working relationship with the local authority, other local agencies and organisations such as Macmillan, the local NHS and registered social landlords, plus funding from the Big Lottery Fund and other charitable foundations. Our income has grown from £825,000 in 2013/14 to over £1.3 million last year. Our service delivery outputs and outcomes have grown too. Last year we helped over 12,500 people.

It’s an exciting time to join us. We’ve recently remodelled our services and invested in expanding our telephone and online delivery. With over 35 staff and 100 volunteers, you’ll find we deliver our services with passion and embrace our core values of

* *Creativity* – CAW is inventive, always looking for better ways to achieve its purpose, deliver value for money, achieve outcomes, change and impact for people
* *Generosity* – to each other, to clients and other agencies; looking to share, being non-judgemental, sympathetic, kind, helpful, collaborative and empowering
* *Quality* – CAW is committed to high quality, responsive, trusted, confidential and independent service, delivered with integrity and confidence
* *Accountability* – to each other, funders, and to the local community

CAW’s current board has 9 committed Trustees with experience in service delivery, management, HR, communications, risk, finance and business planning.

There are three active sub-groups of the board: Finance Committee, People Committee and Strategy Group. These provide active support to the Chief Executive and senior management team and provide scrutiny for, and advice to, the main Board. Board and Committee meetings are quarterly as part of the regular board cycle with ad hoc strategy meetings as required.

The Board is very clear about the difference between executive and non-executive responsibilities. We have also been taking active steps to increase the contacts between the Trustee Board and the paid staff and volunteers in the organisation – these steps are starting to bear considerable dividends in terms of active communication and understanding.



**What’s in it for you?**

* make a positive impact for people in your local area by ensuring Citizens Advice Wandsworth is sustainable and meeting the needs of the community
* meet people and build relationships with trustees, staff and other volunteers
* build on your governance, leadership and strategy skills
* increase your employability

And we’ll reimburse expenses too.

**The Role**

Each individual member of the trustee board has a responsibility to contribute to the discharging of the board’s duties. They can do this by:

* Maintaining an awareness of the business of Citizens Advice Wandsworth
* Taking responsibility for his or her own learning and development
* Regularly attending, preparing for and taking a full part in meetings
* Actively contributing to setting policy and strategic direction, defining goals, setting targets and evaluating performance
* Monitoring whether the service complies with its governing document, whether it meets Citizens Advice membership standards and how well the advice needs of the local community are being met
* Monitoring the financial position of the organisation and ensuring that it operates within its means and objects, and that there are clear lines of accountability for day-to-day financial management
* Supporting the development of the organisation through participation in agreed projects and sub-groups
* Actively seeking to further the strategic objectives of the organisation, and acting in the best interests of CAW at all times
* Maintaining confidentiality about any sensitive/confidential information received in the course of duties as a trustee.

The additional responsibilities of **Treasurer** include:

* leading on any Finance Committee meetings to discuss finances in more detail
* explain, guide and advise the board on the key assumptions and financial implications of the local Citizens’ Advice budgets, operational and strategic plans
* ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services’ needs
* Supporting any paid finance officer to explain, guide and advise the local Citizens Advice 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 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 staff, such as the Chief Officer or Finance Manager to give information and advice on financial matters

**What do you need to have?**

You’ll need an accountancy qualification, and we’re also looking for someone who can demonstrate:

* Some experience or knowledge of charity finance, risk, fundraising and pension schemes
* The skills to analyse proposals and examine their financial consequences
* Willingness to be available to management to provide advice and guidance on financial matters
* Commitment and availability to attend trustee board meetings
* Effective communication skills and willingness to participate actively in discussion
* Willingness to gain knowledge of local needs and resources
* Commitment to the aims, principles and policies of CAW including those relating to equal opportunities, independence and policy influence
* Willingness and ability to act in the best interests of CAW
* Ability to understand and accept their responsibilities and liabilities as trustees and employers
* Willingness to participate in democratic process which develops Citizens Advice policies locally and nationally
* Willingness and ability to learn, develop and examine own attitudes
* Ability to think creatively and strategically and exercise good, independent judgement
* Ability to work effectively as a member of a team
* Lived experience of the issues we address (such as benefit issues, homelessness, debt, ill health/disability, discrimination and/or employment problems) is desirable



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

Trustee boards and Finance Committee usually meet in the evenings and you’ll likely need to give 4-5 hours quarterly plus time to prepare for these. We have an annual Trustee Awayday and you may need to attend other meetings such as other committee meetings, meeting with auditors, if you’re involved in specific projects, or meet with volunteers and staff occasionally. We can be flexible about the time spent and how often you volunteer so come and talk to us.



**Valuing inclusion**

Our volunteers come from a range of backgrounds and we particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, people from Black Asian Minority Ethnic (BAME) communities, or people with lived experience of the issues our services address.

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.



**How to apply**

Please visit our website and download an application form.<https://cawandsworth.org/jobs>

Completed application forms should be emailed to recruitment@cawandsworth.org by **5pm Friday 11th April**

In addition please submit:

* A personal statement no more than 2 sides A4 demonstrating how you meet the person specification and outlining your future vision and ambition for Citizens Advice Wandsworth.
* CAW equality and diversity monitoring form

**Contact details**

To find out more about the post or to have a confidential discussion about the role with the Chair of Trustees please email recruitment@cawandsworth.org with your contact details and daytime availability.