

# Trustee Role Profile

## What will you do?

- complete the Trustee Induction process
- maintain an awareness of how the local Citizens Advice is operating
- read papers for board meetings and attend Board meetings (there are usually four Full Board and four Interim Board meetings each year)
- work on specific projects with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice
- ensure you undertake the mandatory training in accordance to the requirements of Citizens Advice and Citizens Advice Hart
- set policy and strategy direction, set targets and evaluate the performance of the local Citizens Advice
- monitor the financial position of the local Citizens Advice ensuring that it operates within its means and objectives
- ensure that all the finances and supporting financial control systems of the local Citizens Advice 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 the local Citizens Advice ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day-to-day financial management
- undertake a **Lead Trustee role** in at least one of the portfolio areas (e.g., HR, Finance, Risk, EDI, Service Delivery, Information Assurance), providing to both the Board and the CEO a focussed resource in their specific area(s); typically, a Lead Trustee would:

- enhance scrutiny and strategic direction by taking a particular interest in their specific areas to ensure the board discussed areas of concern/strategy apparent from Executive Reports and/or other external information.
- have an overview of policies and the Leadership Self-Assessment (LSA) requirements in their area
- provide a specialist resource for advice and opinion to the Board and the CEO when required
- lead working parties when required
- deliver Board learning sessions when necessary
- ensure policies relating to the portfolio area(s) are implemented and updated in accordance with the required schedule
- ensure policies are consistent with any mandatory policies and advisory notes presented on the Citizens Advice intranet and Workplace
- If agreed and approved by the board undertake any key Trustee positions in accordance with the following template role descriptions on the Citizens Advice intranet:
  - [Vice Chair role description](#)
  - [Treasurer role description](#)
  - [Company Secretary role description](#)
  - [Research and campaigns lead role description](#)



## What's in it for you?

- make a positive impact for people in your local area by ensuring the local Citizens Advice 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 subject to our expenses policy.



## What do you need to have?

You don't need specific qualifications or skills but you'll need to:

- understand and accept the responsibilities and liabilities as trustees
- be non-judgmental and respect views, values and cultures that are different to your own
- have good listening, verbal and written communication skills
- be able to exercise good independent judgment
- have good numeracy skills to understand accounts with the support of the treasurer
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
- be willing to undertake training in your role



## How much time do you need to give?

Trustee boards usually meet in the early evenings, and you'll likely need to give approximately a minimum of 8 hours per month to the role. You may need to attend other meetings if you're involved in specific projects or meet with volunteers and staff occasionally within the local Citizens Advice. 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, LGBTQ+ and non-binary people, and people from minority ethnic communities.