

Trustees



What's in it for you?

- Make a positive impact for people in your local area by ensuring Citizens Advice in East Dorset and Purbeck 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



What do you need to have?

The Board of Trustees needs overall skills and experience in one or more of the following areas:

- Business Development
- Finance - including accountancy to act as Treasurer
- Human Resources & Training
- Marketing & Public Relations
- Risk Management



Person Specification

- 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
- Good independent judgement
- An ability to think creatively
- A willingness to speak their mind
- An ability to work effectively as a member of a team

Citizens Advice in East Dorset and Purbeck is committed to achieving equality of opportunity in both services to the community and the employment of people and expects all employees to understand and promote its policies in its work. As with all positions, this role outline will be kept under review and may develop to meet the changing needs of the service.



How much time do you need to give?

Trustee boards usually meet on a Tuesday morning for 2 hours at Allendale House, Wimborne and you may need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally within Citizens Advice in East Dorset and Purbeck.



What will you do?

- Complete an introduction for your role
- Maintain an awareness of how Citizens Advice in East Dorset and Purbeck is operating
- Read papers for board meetings and attend 4 meetings per year
- Work on specific projects with other trustees or staff within Citizens Advice in East Dorset and Purbeck to further the strategic objectives
- Take an active discussion during board meetings and work with other trustees to:
 - Set policy and strategy direction, set targets and evaluate the performance of Citizens Advice in East Dorset and Purbeck
 - Monitor the financial position of Citizens Advice in East Dorset and Purbeck ensuring that it operates within its means and objectives, ensuring that they are clear
 - Ensure that all the finances and supporting financial control systems of Citizens Advice in East Dorset and Purbeck 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 Citizens Advice in East Dorset and Purbeck ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management
 - Seek the views of all sections of the community and monitor how well the service meets the needs of the local community
 - Ensure that the service plans for the recruitment and turnover of staff and volunteers
 - Review its own work and how effectively it operates including action for improvement



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, and people from Black Asian Minority Ethnic (BAME) communities.

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.

Recruitment Process

- Please send your CV and supporting statement to training@edpcitizensadvice.org.uk
- In initial conversation with the CEO and Chair of Trustees
- An invitation to attend a Board Meeting as an observer
- References taken
- A formal invitation to join the Board at the next meeting tbc
- Induction

For an informal chat about the Trustee roles email: training@edpcitizensadvice.org.uk or call Becky Walters on **01202 857100**