



# Chair of trustees



## What will you do?

- complete an induction for your role
- maintain an awareness of how the local Citizens Advice is operating
- plan the board meetings including the dates and the agenda, with the Company / Charity Secretary and the Chief Executive Officer
- read papers for board meetings and attend board and committee meetings (approx. 8 per year)
- facilitate the trustee board meetings by leading the meeting, ensuring that agenda items are discussed, enabling all members to contribute their views and take part and seeking clarification where necessary
- ensure that decisions and actions taken at board meetings are carried out
- ensure that the board decisions are made within the remit of the Citizens Advice membership agreement, governing documents and policies
- monitor attendance and commitment of all trustees
- provide or arrange for training or support for trustees if needed
- with other trustees and the Chief Executive Officer, recruit a trustee board with a diverse range of skills, experience and knowledge with an aim to promote trusteeship to underrepresented groups that represent the local community
- ensure that all trustees receive an induction and complete the training needed for them to fulfil their role
- be proactive in planning succession and recruiting successors to key positions such as Chair, Treasurer etc.
- provide support and supervision for the Chief Executive Officer including an annual appraisal

- together with the Treasurer, ensure proper management and control of local Citizens Advice finances
- together with the Chief Executive Officer, represent the local Citizens Advice in relationships with funders or potential funders, local events and in the community
- work together with all trustees and ensure that the board is able to:
  - set policy and strategy direction taking into account the Citizens Advice membership agreement, 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, ensuring that there are clear lines of accountability for day to day financial management
  - monitor whether the Citizens Advice service complies with its governing document and meets the required standards
  - 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
  - work on specific projects to further the strategic objectives of the local Citizens Advice and the network as a whole



## **What's in it for you?**

- use your experience to 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 knowledge and skills
- increase your employability

And we'll reimburse expenses too.



## What do you need to have?

You'll need to:

- understand the type of work undertaken by a local Citizens Advice and the Citizens Advice network
- understand and accept the responsibilities and liabilities of a trustee
- be non-judgmental and respect views, values and cultures that are different to your own
- have a good basis of leadership skills
- have the ability to facilitate and lead meetings
- have good interpersonal skills
- 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 mandatory training in your role
- line manage and support the Chief Executive Officer



## How much time do you need to give?

Trustee boards usually meet in the afternoons and you'll likely need to give 1-2 days per month, including board meetings and occasional events, and 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, 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, and people from ethnic minority communities.

If you are interested in becoming a chair of trustees and would like to discuss flexibility around location, time, 'what you will do' and how we can support you please contact us.



## **Contact details**

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