



Treasurer role profile



The Charity

CAWD is an independent charity and part of the Citizens Advice network. We provide free, confidential and impartial advice and campaign on a wide range of issues affecting people's lives.

People come to us with all sorts of issues. It may be related to money, benefits, housing or employment problems. They may be facing a crisis, or just considering their options. Our goal is to help everyone find a way forward, whatever problem they face and we use our clients' experience, stories and evidence to research and campaign for positive change locally and nationally

We are a small local charity with a very small paid team of 11.6 full time equivalent staff, including a part-time Finance Manager; our advice service is primarily provided by volunteers (currently around 70 of them). We do not receive any central government or national funding but do receive an annual grant from Winchester City Council. We are also reliant on local funding and fundraising, some of which comes from projects undertaken for third parties. We operate within very tight budgets, which are getting tighter, and we rely on donations, fundraising and third party projects to make ends meet.

We have offices in Winchester and Bishop's Waltham. We also provide an outreach service at various locations in the district and HMP Winchester, plus a home visiting service.

Governance of the Charity

CAWD is a registered charity (No. 1144965) and a company limited by guarantee. The charity's governing document is its Articles of Association. The Charity is governed by a Board of Trustees. The number of Trustees cannot be fewer than three or more than 15, the current Board has 7 trustees.

CAWD's Board of Trustees oversees the governance and overall direction of the organisation; in addition it guides and supports the senior management team in implementing the charity's strategic vision and policies. The Board also ensures that the charity's funds are put to best use in accordance with legal and regulatory requirements.

We are a member of national Citizens Advice from whom we have a great deal of support.

What will you do?

- complete an introduction for your role
- maintain an awareness of how the local Citizens Advice is operating
- read papers for board meetings and attend 4-8 meetings per year in addition to 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 the Finance Manager to explain, guide and advise the local Citizens Advice on the approval of budgets, accounts and financial statements with the organisation's framework
- 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

- present accounts at the Annual General Meeting (AGM) in an accessible way for volunteers and staff
- keep the board informed about its financial duties and responsibilities
- monitor the organisation's income and expenditure position and in conjunction with the Finance Manager 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
- work together with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice, including developing a fundraising strategy
- 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 the local Citizens Advice
 - 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
 - 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
 - review its own work and how effectively it operates including action for improvement



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.



What do you need to have?

You'll need to:

- understand and accept the responsibilities and liabilities as trustees
- have financial qualifications or experience
- some knowledge or experience of charity finances, fundraising and financial consequences
- 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 and if necessary to make difficult recommendations
- excellent numeracy skills to understand accounts
- be able to explain complex financial information in an accessible way
- 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?

The Board of Trustees meets formally four times a year. Meetings are normally held on a Wednesday in central Winchester. Ad-hoc working groups are

established from time to time to take on short-term projects. In between Board meetings, more informal meetings are held if business needs require it and all Trustees are invited to these. But there is an understanding that trustees can't always get to every meeting.

Trustees are also involved in occasional strategic planning sessions with the staff and are invited to attend the charity's external events, fundraising exercises and volunteer meetings. A full induction programme is available to new trustees in the first 6 months to ensure they get a good understanding of Citizens Advice and can contribute effectively to the Board's work.

The Treasurer is also involved in working with the Chief Officer and Finance Manager in the preparation of the annual budget, any necessary reforecasts and the triennial grant application to Winchester City Council.



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.



Interviews

These will be held in early June, in our Winchester office.

For further information please contact: admin@cawinchesterdistrict.org.uk

Our team will ask you for your contact details and for a CV if you have one handy (not essential), and will ask our Chair, Sarah Gooding, to get in touch with you.

We look forward to hearing from you!