



Treasurer Recruitment Pack

Thank you for your interest in volunteering with Citizens Advice Bury & Bolton as a trustee. This job pack should give you everything you need to know about the role, how to apply and what it means to volunteer at Citizens Advice service.

In this pack you'll find:

- Citizens Advice Bury & Bolton (CABB) – About Us
- Our values & 3 things you should know about us
- How the Citizens Advice network works
- Governance structures & commitment
- The Treasurer role, key responsibilities, skills and experience
- The treasurer role profile and person specification
- Key dates & how to apply.

Want to chat about the role? Contact:

Chief Executive Officer: Gary Malcomson via gmalcomson@cabb.org.uk

To apply, complete the form below:

<https://www.cabb.org.uk/volunteer-with-us>

Citizens Advice Bury & Bolton (CABB) – About Us

We are a dedicated local charity committed to offering free, impartial, and confidential advice, information and support to individuals across Bury & Bolton (with some out of area services). We value diversity, promote equality and challenge discrimination.

We are committed to putting equality and equity at the heart of everything that we do, with the overarching aim of being the go-to charity for anyone across Bury & Bolton in need of help, to find a way forward. This means we look at improving access, treating people with empathy and promoting an inclusive working environment for all of our colleagues.

As an individual charity, the Board of Trustees have overall responsibility for the strategic direction and oversight of CABB, delegating day to day management and delivery to the CEO and wider Executive Team, consisting of:

- Chief Executive Officer
- Director of Advice & Operations
- Director of Finance.

Whether individuals are facing a single issue or a complex set of problems we provide personalised one-to-one advice. During 2023, we assisted 17,000 individuals with over 55,600 unique issues and helped clients gain over £14m.

Our 2022-23 we had an income of £1.6m.

We do more than fix immediate problems, our advice makes a significant difference to the people we help:





Client Comments



Our values

We're inventive - We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous - We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

We're responsible - We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

3 things you should know about us

We're local:

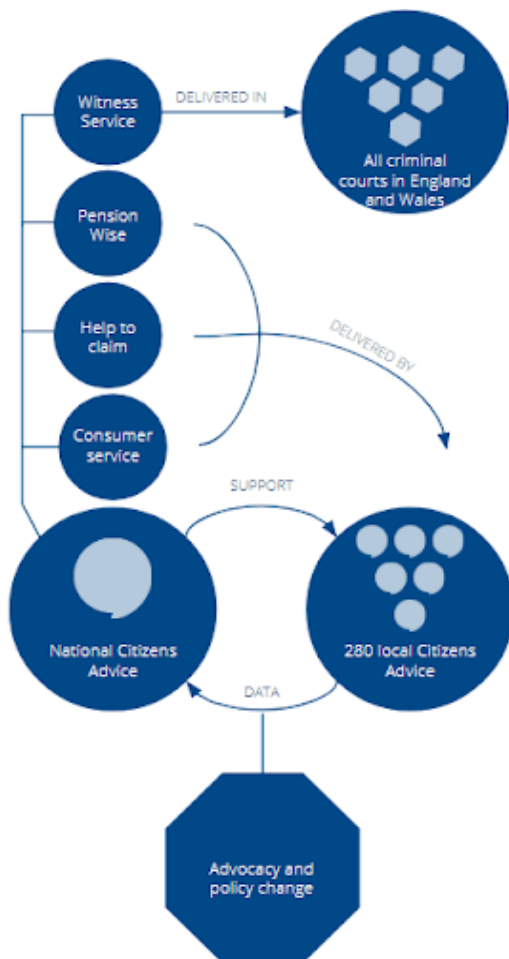
We have offices in Bury and Bolton, and deliver outreach sessions for clients across Bury, Bolton and other areas of Greater Manchester. During 2023, we assisted 17,000 individuals with over 55,600 unique issues and helped clients gain over £14m.

We're here for everyone:

Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

We're listened to - and we make a difference:

Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.



How the Citizens Advice network works

Citizens Advice Bury & Bolton is a member of the Citizens Advice service nationally with circa 250 local Citizens Advice members.

Citizens Advice nationally is a charity which includes 1000 national staff working in one of 4 offices, as homeworkers or as part of the Witness Service from over 240 courts across England and Wales 2500 Witness Service volunteers.

Local Citizens Advice are all independent charities, delivering services from over 600 local Citizens Advice outlets over 1,800 community centres, GPs' surgeries and prisons.

The network does this with 7,700 local staff and over 21,300 trained volunteers.

Our Governance Structures & Commitment

Trustees are responsible for deciding how the organisation is run, including setting the strategy, deciding how resources are used, and making sure the charity is fulfilling its purpose. We currently have 9x trustees.

Following a recent review of our governance structures, we have the following formal committees which report to the Board of Trustees:

- People & EDI Committee
- Finance & Risk Committee
- Service Impact & Quality Committee.

Our Board of Trustees meet on a quarterly basis. These meetings are usually in-person on Tuesday evenings and alternate between our Bury or Bolton offices, start at 6pm and last for 1.5 – 2 hours.

Our committees are also quarterly and, depending on the meeting, held in-person or remotely on Tuesday/ Thursday from 6pm.

In addition to meetings, there is an expectation that Trustees will spend time preparing for board/ committee meetings, and participating in ad-hoc meetings/ bespoke pieces of work, including our annual basis, we also have a senior leadership team away day for Trustees and the Executive Team.

The Treasurer Role

Following retirement, we are seeking a new Treasurer to join our Board of Trustees. This is a voluntary role, with all reasonable expenses are reimbursed.

We expect that the successful candidate will have knowledge and experience of organisational finances, who can explain complex financial information in an accessible way. Ideally, they might also have some experience of charities, but that is not essential.

The role of the Treasurer is to oversee the financial affairs of CABB, ensuring its financial viability whilst complying with relevant financial regulations, supported by the Director of Finance who carries out the day-to-day financial accounting/ reporting.

Key Responsibilities

- Monitor Citizens Advice Bury & Bolton's income and expenditure position and in conjunction with the Director of Finance, present accessible reports at least quarterly, ensuring board members understand the accounts and implications.
- Chair the Finance & Risk Committee meetings, reporting to Board Committee activities.
- Be an active member, effectively contributing to board meetings discussions, and any other committees/ away days as appropriate.
- Understand the accounting procedures and key internal controls to be able to assure the board that the charity's financial integrity is sound.
- Explain, guide and advise the board on the key assumptions and financial implications of Citizens Advice Bury & Bolton budgets, operational and strategic plans.
- Ensure Citizens Advice Bury & Bolton has an appropriate reserves policy and a realistic budget that meets the services' needs.
- Working with the Director of Finance and CEO explain, guide and advise Citizens Advice Bury & Bolton 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 attendees.
- 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 Companies House, and make arrangements for them to be audited or independently examined as required.
- Work with key Citizens Advice Bury & Bolton staff to give information and advice on financial matters.
- Work together with other trustees and staff within Citizens Advice Bury & Bolton to further the strategic objectives of Citizens Advice Bury & Bolton, including developing a fundraising strategy.

What's in it for you?

Volunteering is a great opportunity to give back to local communities and make a positive impact across Bury & Bolton (and beyond), while using your knowledge and skills.

This is a real opportunity to build on your governance, leadership and strategy skills.

By being part of the Citizens Advice network, you will also benefit from a vast range of training/ development opportunities, working groups and forums.

Skills/ Experience Required:

- Having financial management experience is a key requirement, including some knowledge or experience of charity finances, fundraising, financial consequences and pension schemes.
- Financial qualifications would be advantageous, but is not essential.
- Have strong numeracy skills to understand accounts.
- Have good listening, verbal and written communication skills, with the ability to explain complex financial information in an accessible way.
- Understand the type of work undertaken by a Citizens Advice Bury & Bolton.
- Understand and accept the responsibilities and liabilities as trustees.
- Ability to facilitate and lead meetings.
- Be willing to undertake training in your role.
- Be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection.

Valuing Inclusion:

At CABB, we value diversity, promote equity and challenge discrimination. We encourage and welcome applications from people of all backgrounds. We particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from racially minoritised communities.

Key Dates

Closing date	26th February 2024, 10am
Interview date	4th / 5th March 2024

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