

# Treasurer – role description

## In summary

### ***Could your financial skills help transform the lives of people in need in Bradford?***

Each year, we help over 5,000 people in Bradford overcome obstacles preventing them from achieving their potential. For example, we save people from being evicted, we challenge unfair benefits decisions, we help people manage debts, and we tackle complex immigration issues. Our free, expert advice gives people the skills and confidence they need to address their problems and move on with their lives.

### ***We are seeking a Treasurer with senior-level, strategic financial expertise to join our Board – this volunteer role will appeal to someone wishing to use their skills and experience to help improve the lives of thousands of people across our city.***

The Treasurer attends 6 board meetings a year and chairs our Finance Sub-committee. Meetings are typically held on weekday evenings.

***For more information or to apply with Covering letter/CV to:  
[richardw@bradfordcab.com](mailto:richardw@bradfordcab.com) Deadline 9 August 2024***

Citizens Advice Bradford & Airedale and Bradford Law Centre Ltd is a registered charity run by a Board of Trustees. All Board members are volunteers. The Board's role is to set the strategic direction of the charity, to appoint an employed leadership team to deliver the strategy, and to ensure the good governance of the organisation. The Board meets five or six times a year, with Personnel and Finance sub-committees meeting with a similar frequency.

The Treasurer attends Board meetings, chairs the Board's Finance sub-committee and liaises with the Chair, Chief Officer and employed finance team to ensure the effective financial governance of the charity. The Board and Finance sub-committee typically each meet six times a year, with most meetings taking place on weekday evenings. The voluntary time commitment is likely to be an average 1-2 hours a week over the year.



## What will you do?

- complete an induction for your role
- maintain a good awareness of how the charity is operating
- attend 5-6 Board meetings per year, reading papers in advance
- chair Finance sub-committee meetings to review finances in more detail

- explain to, guide and advise the full board on the key assumptions and financial implications of the charity's budgets and its operational and strategic plans
- ensure the charity has an appropriate reserves policy and a realistic budget that meets the services' needs
- support the employed finance team to explain, guide and advise the board on the approval of budgets, accounts and financial statements
- present accounts at the Annual General Meeting (AGM) in an accessible way for volunteers and staff
- ensure 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
- keep the board informed about its financial duties and responsibilities
- monitor the organisation's income and expenditure position and, in conjunction with the employed finance team, 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

In addition, as a Board member, the Treasurer will work with other trustees and the executive team to further the charity's strategic objectives, including developing an income generation strategy. Collectively, the Board is expected to:

- set the charity's policy and strategy direction, set targets and evaluate performance
- 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?

You will:

- receive an induction to fully explain the work of the Bradford Citizens Advice, including the finances; you will also receive training, supervision and support as needed
- use your financial skills and expertise to help the charity transform the lives of people in Bradford by ensuring the charity is sustainable and meets the needs of the local community
- work as part of a committed team of trustees, staff and other volunteers
- build on your governance, leadership and strategy skills
- increase your employability

We are committed to ensuring Board roles are accessible to everyone with appropriate skills and experience, including lived experience of the issues we address. We will reimburse expenses board members incur through the course of their work.



## What do you need to have?

You'll need to:

- understand and accept the responsibilities and liabilities of trustees; further information is available at: <https://www.ncvo.org.uk/help-and-guidance/governance/responsibilities-for-boards/the-legal-duties-of-trustees/>
- have financial qualifications or significant financial experience; an accountancy qualification is desirable
- have some knowledge or experience of charity finances, fundraising, financial consequences and pension schemes
- 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
- be able to explain complex financial information in an accessible way to board members, staff and volunteers who may not have financial experience
- 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 and Finance sub-committee typically each meet six times a year, with most meetings taking place on weekday evenings. The voluntary time commitment is likely to be an average 1-2 hours a week over the year.

You may need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally. We can be flexible about the time spent and how often you volunteer so come and talk to us.



## Valuing inclusion

Our volunteers including Board members come from a wide range of backgrounds. Bradford is a diverse community, and we are working hard to ensure our Board and wider team is representative of the community we serve.

We particularly welcome applications from minority communities, from disabled people, people with physical or mental health conditions, LGBTQ+ and non-binary people, and others. 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.

Whilst experience operating at a senior level within an organisation is likely to be needed, we welcome applications from people who are new to being a charity trustee. We will provide training and support as needed.



## How to apply and contact details

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