

Candidate Pack Treasurer

citizens
advice



Welcome

Dear applicant



Thank you for your interest in becoming our new Treasurer at Citizens Advice. As a network of charities, we're united by a common purpose, which is to shape a society where people face far fewer problems. We're driven by our ambition to make things better for people, individually and collectively. We're driven by the power of good advice, to help people solve their problems. And we're driven to change the underlying causes of problems, through our work with governments and other organisations, to help people face far fewer problems.

We provide advice to people with many different kinds of problems. This gives us a uniquely deep insight into the challenges people are facing today, in an era of uncertainty and challenge. With the evidence we gather, we can show big organisations – from companies right up to Government – how they can make things better. We therefore have a significant role to play in influencing services and policy making across the UK, driving and shaping the thinking and decisions that stand to benefit people everywhere, now and in years to come.

Our new Treasurer will provide high-level strategic financial management oversight to a talented Board and senior executive as we progress through a period of extensive cultural and service transformation at Citizens Advice, led by our new Chair Matthew Swindells. Ideally with experience of operating at Board level (as a senior executive or non-executive) and with a professional finance qualification as essential, you will bring deep experience of financial management and oversight, gained at leadership level with the ability to clearly communicate and explain financial information to a range of audiences.

Whatever sector your expertise has been gained in, you will have an excellent understanding of good governance drawn from comparably large-scale and complex organisations and you will intuitively understand where financial challenges may lie and how to solve them. Candidates will be strategic thinkers and provide constructive challenge and steer to both our Board and our committed senior executive. Above all, you will have focus and clarity as to the big issues we face and will be navigating both financially and more broadly in the coming years.

We're looking for a someone who is a trusted and authoritative presence, and who has sound judgement and perspective. Highly effective interpersonal skills, emotional intelligence and a naturally collaborative approach, candidates will be comfortable with complexity and carrying accountability as we bring about positive change. This role requires strong relationships and alliances, and through the encouragement of co-operation and commitment to shared goals within and beyond our network. Critically, you will be personally committed to the impact of the work we do.

Equity, Diversity and Inclusion (EDI) is of strategic importance and integral to all we do as a service: central to pursuing our EDI mission is building a diverse and inclusive organisation in which everyone has a sense of belonging. We are committed to diversity at Board level, and we strongly encourage applications from those who are disabled, have caring responsibilities, or are people of colour.

If you believe you can bring the experience, capability and leadership attributes we're looking for, we very much look forward to hearing from you.

Sarah Wilson, Acting Chair and Matthew Swindells, Chair Designate, Chair from 1st March 2024



Honestly Citizens Advice is such an important service at the moment. I don't think they realise just how important they are to people out there... having that extra energy and council tax help, it has taken the worry away. It takes the pressure of thinking, if the extra money hadn't come in, what would I have done?

Lucy, Client

About our organisation

The Citizens Advice service offers free, confidential advice online, over the phone and in person. We give people the knowledge and confidence they need to find their way forward—whatever they are, and whatever their problem. We're independent and impartial.

Citizens Advice is a network of around 250 independent local charities across England and Wales. The service is delivered by our highly trained people, made up of around 16,000 volunteers and 8,843 staff. We're in 1,615 community locations (including GP surgeries, libraries and courts) in England and Wales.

Through the training, information systems and operational support it provides, national Citizens Advice equips local Citizens Advice to deliver the highest quality advice to their community. Each local Citizens Advice is a member of the national Citizens Advice charity. All together we form the Citizens Advice service.

Citizens Advice helped 2.66 million people one-to-one, by phone, email, webchat or in person in 2022-23. Our advice website had over 42.7 million visits and 60.6 million page views.

We supported 79,000 witnesses in courts through the Witness Service and gave pension guidance to people aged over 50. We're also the statutory consumer watchdog for the energy and post industries, meaning we advocate on behalf of consumers in these markets.

We have real time data from our millions of clients. This evidence helps us identify emerging issues, understand what is causing them and make recommendations to policymakers on how to fix the problems.

Helping people solve their problems can stop issues getting worse and can save money further down the line. In 2022-23 we saved government and public services at least £681 million.

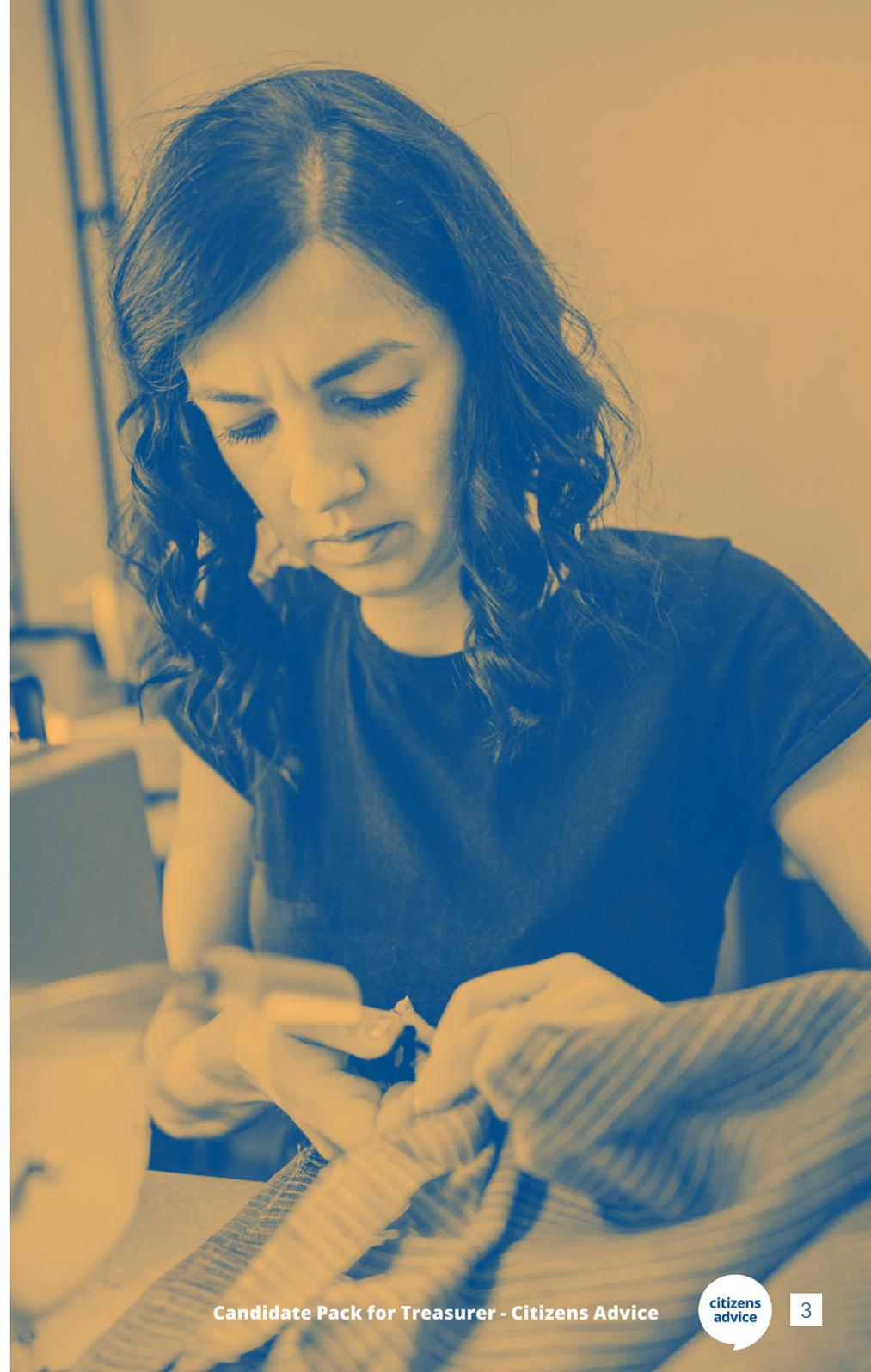
Our living strategy - Transforming together: trusted advice in times of Change

Recent years have been a period of particular hardship for the people we support. It's especially worrying to see the rise in the number of people who simply can't make ends meet and need crisis support in the form of food bank vouchers.

The successive challenges of COVID-19 and the cost of living crisis continue to have deep and widespread ramifications. Our advice isn't enough to make ends meet. Some of our tools and approaches aren't working as they used to, and our service is facing financial pressures.

Our strategy, 'Transforming together: trusted advice in times of change', is a response to these challenges. It will help us transform our service so we can continue to be a positive force for change for individuals, communities and society now and in the future.

The 'living strategy' approach that we've adopted affirms our sense of purpose and direction, allows us to find new ways to respond to challenges, and creates the flexibility to course-correct along the way. This first phase of our living strategy brings together all of those things that define who we are as a service and sets our ambition to extend the reach and impact of our work with clients.



Equality, diversity and inclusion

Equity, diversity and inclusion (EDI) is integral to all we do as a service, not only for the people we help, but also for our volunteers and staff.

We seek to research and understand how issues in society impact on our volunteers, staff and the people we help in different ways, and we aim to ensure that the diversity of needs among our clients, particularly those from marginalised groups, is taken into account.

Our research shows that groups marginalised by society are disproportionately affected by societal issues such as benefits, housing, employment and household finances. The pandemic shone a light on these pre-existing inequalities and made some of them worse.

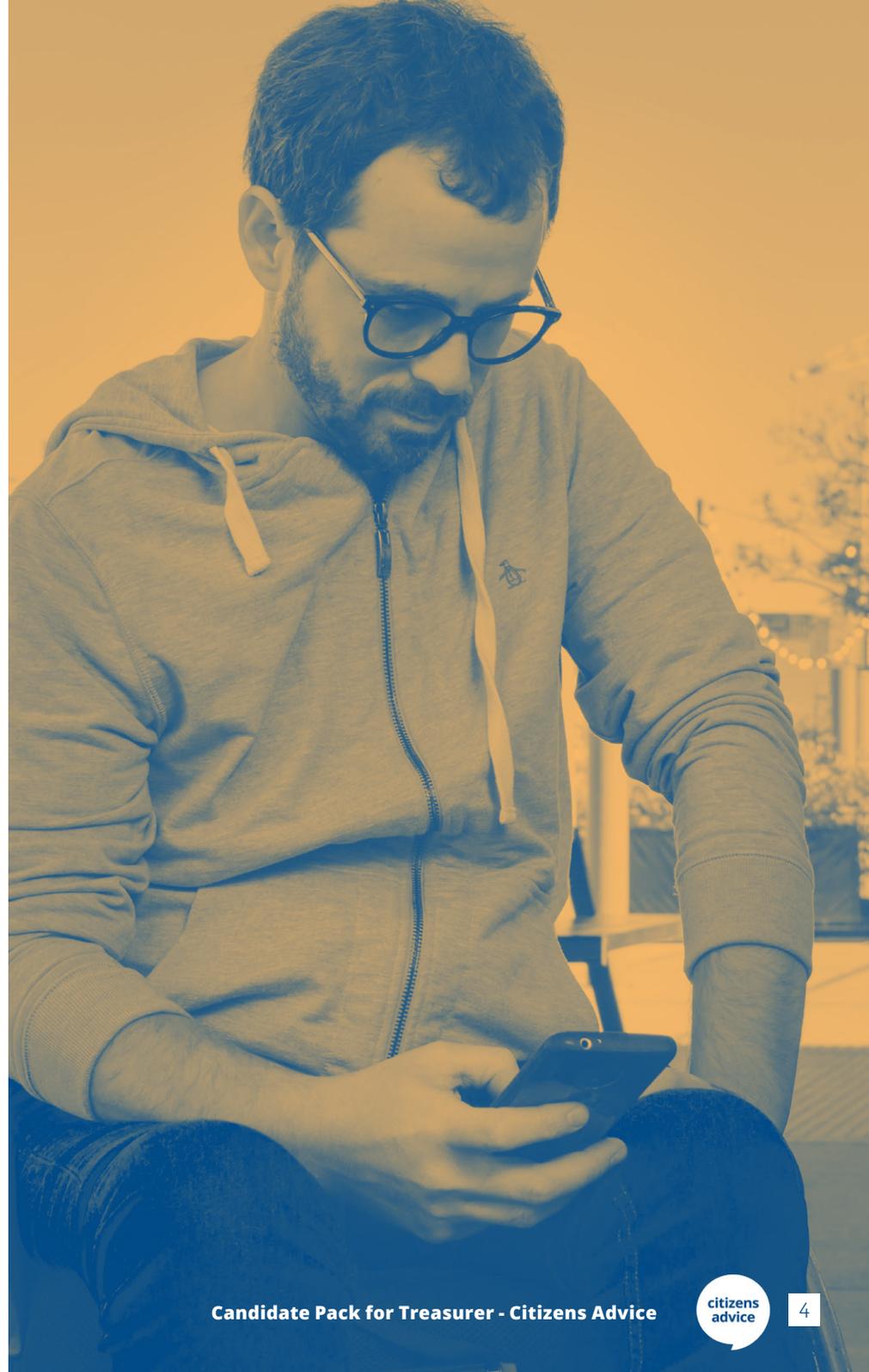
Because of these social inequalities and the worsening cost-of-living crisis, we know that marginalised communities are more likely to need our advice, support and advocacy. This year, Citizens Advice has continued to highlight and work towards addressing the equality disparities faced by clients and our colleagues across the service. We have developed tools to enhance our organisational EDI capability, which is more important than ever.

We continue to ensure that EDI is at the heart of strategic planning and decision-making, particularly as we work on our new living strategy.

Find out more

[Visit our website](#)

[Read our 2022-2023 Annual Report here](#)



About the Treasurer appointment

Our Board of trustees is collectively responsible for the overall management, governance and strategic direction of the national charity. This includes developing the organisation's strategy in accordance with governing documents, legal and regulatory guidelines. Trustees' skills complement rather than mirror the skills of our executive team. Trustees maintain a strategic focus across the Citizens Advice service and are not involved in day-to-day operational work.

The Treasurer is a trustee of the national charity. They will also work closely with our Executive Director of Finance, Finance Director and other senior members of the finance team.

Our Treasurer is also responsible for supporting trustees to understand the financial position of the charity and the financial implications of decisions they are making; for ensuring that the charity's annual report and accounts are properly prepared and presented in line with legal and regulatory requirements, and presenting them to members at the Annual General Meeting; and for Chairing the Audit and Risk Committee, membership of those committees whose remit covers finance, audit, risk or remuneration – please note, the board committee structure is under review.

You must be able to demonstrate the skills required to fulfil the fundamental responsibilities of a trustee, as set out below.

Fundamental responsibilities of the trustee board

- **Setting Strategy** Developing and maintaining vision, strategy and clear objectives for Citizens Advice in the long-term best interests of the service's clients.
- **Finance and Budget Matters** Making sure funds are used to further the Trustee Board's vision and objectives. Setting, monitoring and changing budgets, overseeing investments, pensions, accommodation arrangements, signing off the Annual Report and Accounts.
- **Legal obligations** Ensuring that the charity complies with its charitable objects at all times, and with the law more generally.
- **Reporting and Monitoring** Overseeing performance management and holding the Executive Team accountable, as well as working closely with them as they progress the strategy.
- **Leadership** Building strong relationships with local Citizens Advice, funders, government, regulators and the corporate sector to further the Trustee Board's vision and client needs. Demonstrating Citizens Advice values in behaviour and decisions.
- **Setting and Ensuring Standards** Making sure the Citizens Advice service can deliver the vision. Upholding the Membership Agreement by ensuring the local and national performance quality frameworks holds the organisation to high standards.
- **Ensuring Accountability** Being open to challenge and questioning from the Network, listening and consulting with the Network and explaining decisions clearly.
- **Employment** Appointment, appraisal and dismissal of the Trustees and the Chief Executive.



I can't really put into words... how thankful I am to Citizens Advice. If it wasn't for them I would have just given up.

Ray, Client

Person specification

We are especially interested in candidates who have the skills below to strengthen the capacity of our board.

For this role it is essential that the successful candidate has a professional financial qualification, and significant experience of senior financial leadership, and developing and delivering financial strategies in a large or complex organisation. No candidate will have all of the following skills and experience, but we are looking for a candidate who can show a range of competencies across the following:

Your knowledge and experience

- [Essential] A professional financial qualification, and significant experience of senior financial leadership, and developing and delivering financial strategies in a large or complex organisation.
- A strategic understanding of how to increase financial stability and to diversify a funding base.
- Experience of working with a multi-skilled non-executive board membership.
- Ability to apply experience between sectors - e.g. from comparably complex non-charity contexts into a charity environment.
- Knowledge of big charity governance principles and practices.
- Experience of a complex federated charity environment (or able to relate to the specific challenges of federated structures).
- Supporting and coaching / mentoring Senior Financial staff
- Knowledge of how to deliver major transformation projects while ensuring that service to clients or to the public is maintained.
- Expertise in risk management.
- Experience of working in or with diverse communities.

Your skills, abilities and personal qualities

- Knowledge of communicating effectively with diverse stakeholder groups.
- Excellent influencing skills, and the ability to network at the highest level for the benefit of the Citizens Advice.
- The successful candidate will play an active role in our board committees, particularly the Audit and Risk Committee, and must have effective chairing skills.
- The ability to drive forward a culture of collaboration and openness, a non- hierarchical approach and the possession of strong diplomacy skills.
- A strategic mindset and long term approach; and collaborative listener.
- A strong empathy and understanding of Citizens Advice and a connection to our mission, vision and values.
- A trusted presence, with low ego and high personal credibility; you will bring and an engaging and collaborative style that inspires confidence.
- Undisputed personal integrity, a fair, inclusive and open leadership style. and the ability to act impartially and fairly.
- You will be sensitive to the political, social and economic environment in which the Citizens Advice service operates.
- Empathetic, passionate and ambitious.
- Lived experience of our services or of being from a marginalised community

We are committed to diversity at board level and we strongly encourage applications from those who are disabled, have caring responsibilities, or are people of colour.



Terms of Appointment

Time commitment

Trustees are expected to contribute between 14-16 days per year, including adhoc activities and advice, often by email or in online meetings. This post is expected to be actively involved in the Board committee structure.

There are four trustee board meetings each year, plus two strategy days and one annual general meeting (AGM).

You will also Chair the Audit and Risk committee, matching your skills, experience or areas of interest, which meet three or four times a year.

Remuneration

This appointment is offered on a voluntary basis with all reasonable expenses incurred as part of the role reimbursed in full.

Location of meetings

Trustees must be willing to travel as required for in person meetings that may be held in 1 of our 4 offices – Birmingham, Cardiff, Leeds and London or other locations across England and Wales. Online attendance is possible for some meetings.



How to express an interest in the role

We hope you will consider making an application to join our Board as Trustee of Citizens Advice. To make an application, please go to <https://starfishsearch.com/jobs/ca-treasurer/> and click on the apply now button, with the following prepared:

- Your CV (no more than three sides).
- A supporting statement (no more than two sides) that sets out why you think this appointment is right for you and how you meet the criteria.

We would also be grateful if you would also complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

The closing date is **Friday 5th April 2024**

Selection Timetable

Closing date	Friday 5th April 2024
Structured discussions	w/c Monday 15th April and w/c Monday 22nd April 2024
Final Panel Interviews	w/c Monday 6th May 2024 (TBC)

