

Citizens Advice Ipswich

Financial Management Portfolio holder, Trustee Recruitment

About Citizens Advice Ipswich

Citizens Advice Ipswich is one of the leading free independent advice providers in Ipswich. Last year we assisted over 4,000 local people with over 17,000 issues.

Citizens Advice Ipswich works to change the lives of people who live, work and study in Ipswich. We exist to make sure people have the information, advice and confidence they need to make informed decisions about issues that affect them directly, and to take positive and independent action to improve their own lives. We do this by providing free, confidential and impartial advice to people on their rights and responsibilities. We also collect evidence and lobby to improve the policies and practices that adversely impact on people's lives.

For many years Citizens Advice Ipswich has been providing the communities of Ipswich with advice and guidance on issues such as debt, welfare benefits, employment and housing. Our services are tailored to meet the needs of the communities we serve. People can access our advice services across the borough, through our office in Ipswich and through various Outreach Services locations including GP surgeries. The advice and support we offer is provided through drop in sessions and appointments. In addition people can reach us through our telephone Adviceline (0300 330 1151) or via our website www.citizensadviceipswich.org.uk

Citizens Advice Ipswich is an independent charity (1064862), a company limited by guarantee (3438957) and a member of the high profile national organisation, Citizens Advice, which requires us to abide by a range of robust quality and membership standards which are assessed each quarter and subject to a three year external audit by Citizens Advice.

Ipswich is a vibrant and diverse borough and has areas of relative affluence alongside relative poverty.

Our Income and Resources

Citizens Advice Ipswich is funded by a number of organisations including: Suffolk County Council, Ipswich Borough Council, Babergh District Council, Suffolk Community Foundation and the Money Advice Service. The expected annual turnover for 2017/18 is approx. £300,000. For further information see the Report and Financial Statements for the year ended 31 March 2017 available on the Charity Commission website.

We have a highly skilled and motivated professional paid staff group of 15 who are assisted by over 50 volunteers. Roles for volunteers include administration, reception, telephone assessors, advisors and caseworkers. All volunteers are

supervised and supported by paid staff. Our volunteer group contributed 39,000 hours last year.

Our Users

Our clients come from the local community in Ipswich including some of the most deprived wards in Ipswich. Many are in low paid employment and have multiple and complex problems they are unable to resolve without support. The largest areas of enquiries are: debt and welfare benefits but utilities, housing and employment issues are on the increase.

The future

As an organisation we are always looking to the future and planning ways in which we can make our services even more accessible, impactful and relevant in these changing times. In planning for the future Citizens Advice Ipswich must take account of changes in the local, regional and national environment. There are major changes that are increasing the demand for advice services including:

- welfare reform and the roll out of Universal Credit
- low income and income deprivation in Ipswich
- Brexit
- the growing demand for adult social care
- the shortage of affordable housing in Ipswich

We need to work to meet the growing demand. It needs to be easier for our clients to access our services; we need to both protect face to face resources, and meet changing clients' needs by the increasing use of technology and telephony.

We need to develop new partnerships and working relationships, deciding what we can offer and when we should refer clients seamlessly to other services.

We need to explore new funding models, looking at how we generate new, sustainable sources of income for our services.

Financial Management Portfolio Holder.

We currently have a small but highly skilled team of trustees from a wide range of backgrounds. We recently appointed a new Chair of Trustees, Bob Boxall-Hunt, after our previous Chair had completed her six year term of office. The current vacancy has arisen due to our Treasurer ending their period of office and the necessity to build the skills and diversity of our Board for the challenges ahead.

Citizens Advice Ipswich is seeking to recruit the following role:

- **Treasurer** with a finance background who would be willing to chair the Finance Sub Committee. (For role details see Appendix 1 below).

The Trustees of Citizens Advice Ipswich share responsibility for the charity's performance in meeting its Objects as set out in its Articles of Association. The Trustees must also ensure that the organisation's actions conform to the legal and governance framework of the relevant Companies Act and to the Charity Commission.

The Trustees form the Board of Directors of Ipswich and District Citizens Advice Bureau, the registered company name of Citizens Advice Ipswich. The Board appoints all Trustees. The Trustees' terms of office are for three years with the opportunity to serve for one further term of three years.

The Trustees hold a minimum of four Board meetings each year and in addition one 'away day'. There are a number of Portfolio areas which support the Board in the management and governance of the charity. These meet as required and trustees are expected to participate in at least one of these Portfolio Areas.

As a Trustee of Citizens Advice Ipswich, you will be central to helping to make decisions about how we ensure our work responds to the needs of the local communities, makes the best use of the resources we have available, and ensure our services are always of the highest quality.

You will be working with a team of experienced Trustees alongside our experienced Chief Executive, managers, staff and volunteers. You will have the opportunity to develop your skills in governance and leadership, engage with staff and volunteers and be involved in influencing change at a strategic level, and make a real difference to the lives of people across Ipswich.

You will on occasion act as an ambassador for the organisation and attend appropriate meetings and events with funders, local councillors and MPs and organisations across the public, private and voluntary sector.

We are looking for someone who can offer the following generally: -

- commitment and availability to attend trustee board meetings
- effective communication skills and willingness to participate actively in discussion
- willingness to gain knowledge of local needs and resources

- commitment to the aims, principles and policies of the Citizens Advice service, including those relating to equal opportunities, independence, and research and campaigns
- willingness and ability to act in the best interests of the Citizens Advice Ipswich
- ability to understand and accept their responsibilities and liabilities as trustees and employers
- willingness to participate in democratic process which develops Citizens Advice policies by area and nationally
- willingness and ability to learn, and to develop and examine their own attitudes
- ability to think creatively and strategically, and exercise good, independent judgement
- ability to work effectively as a member of a team.

And specifically: -

- financial qualifications or experience
- some experience or knowledge of charity finance, fundraising and pension schemes
- the skills to analyse proposals and examine their financial consequences
- preparedness to make unpopular recommendations to the board
- willingness to be available to staff to provide advice and guidance on financial matters.

We welcome applications from residents of Ipswich and surrounding boroughs irrespective of ethnicity, race, nationality, disability, age, religion or belief, gender and sexual orientation. The role is voluntary and unpaid but reasonable expenses can be reimbursed.

Time Commitment

We need an individual who has the capacity to make an active contribution to the organisation. You will need to make time available in the first three months to undertake a full induction to gain an understanding of the full range of services provided by Citizens Advice Ipswich, the challenges faced by our users and how the service is resourced and managed. Trustees are expected to attend all Board meetings (up to 3 hours duration), reading the papers in advance and being prepared to contribute to the strategy, discussion and decision making. The Treasurer is expected to lead the Financial Sub Committee which meets each quarter. We also expect Trustees through the year to attend a small number of daytime and evening conferences and/or meetings including events hosted by Citizens Advice.

Application Process

If you have the required skills and enthusiasm we would love to hear from you. For an informal and confidential discussion contact the CEO, Nicky Willshere at manager@ipswichcab.org.uk

To apply please send a letter of application (no more than two sides of A4) showing how you meet the brief, in particular the skills and experience sought. Please send this with your CV to manager@ipswichcab.org.uk Please list any Directorships or Trusteeships that you currently hold.

Appendix 1: Treasurer Role

We are looking for a volunteer to join our Trustee Board in the role of Treasurer to support the work of Citizens Advice Ipswich and ensure the financial management and strategies support the work of the service and help us achieve our aims and objectives. As Treasurer you will directly assist the CEO, the Financial Administrator and the Board to ensure the organisation is financially viable, run in a prudent and effective way and making the best use of limited resources.

The overall purpose of the role is to contribute actively to the Board's roles in giving firm strategic financial direction to Citizens Advice Ipswich, ensuring financial viability, compliance with relevant legislative frameworks and to act as the leading interface between the Trustees and the CEO on financial matters.

Main Duties

- Chairing the Finance Sub Committee each quarter, and reporting back to the full Board.
- Guiding and advising the board in the approval of budgets, accounts and financial statements, within a relevant financial policy framework
- Keeping the board informed about its financial duties and responsibilities
- Advising on the financial implications of the bureau's strategic plans and key assumptions in the operational plan and annual budget
- Ensuring that all board members have a clear understanding of the accounts presented at meetings and the implications that they reveal
- Understanding the accounting procedures and key internal controls to be able to assure the board that the charity's financial integrity is sound
- Ensuring that a realistic budget is produced which meets all the bureau's needs and that there is an appropriate reserves policy
- Monitoring the bureau's income and expenditure position, and presenting reports to the board at least quarterly, in a format accessible to the board members
- Ensuring that full financial records are kept for all transactions, and that proper financial procedures and controls are in place to safeguard the bureau's resources
- Ensuring that money received is only spent on the purposes for which it was given, and, where required, ensuring that reports and accounts demonstrating this are submitted to funders
- Ensuring that accounts are prepared at year-end in compliance with the SORP Accounting for Charities and making arrangements for them to be audited or independently examined, as required by the Charity Commission
- Ensuring that annual accounts are submitted to the Charity Commission and/or Registrar of Companies, within the deadlines set
- Presenting the accounts at the AGM and drawing attention to important points in a coherent and understandable way
- Liaising with the bureau manager about financial matters
- Playing a key role in planning a clear fundraising strategy to raise money for future activities and developments
- Chairing any finance committee, and reporting back to the full board.