

**York and District Citizens Advice Bureau
Citizens Advice York role description: trustee**

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Title: Trustee (volunteer)

Responsible to: The Chair and Trustees

Main purpose of the role

As a member of the Trustee Board (TB) to

- determine the Bureau's mission and long term aims
- approve the Bureau's strategy, Business Plan, budgets and targets; monitor performance

Provide support, guidance and challenge in the development and implementation of Bureau strategy

Key responsibilities

- enable the Bureau to meet fully its statutory and other requirements in respect of
 - setting budgets, approving strategies, policies and monitoring performance
 - maintaining the solvency of the Bureau
 - reporting to statutory bodies
 - conducting business in accordance with its Instrument & Articles and good practice
 - compliance with the CitA agreement
- follow the highest standards of corporate governance in line with the Nolan Principles
- to prepare for and participate actively in TB meetings, other trustee and Bureau activities
- establish open, supportive, challenging and effective relationships with other trustees, the CEO and members of the senior management team
- keep informed of and support the work of local Citizens' Advice, always acting in its best interests, maintain the confidentiality of all sensitive and confidential information received as a trustee

Relationships

- trustees
- the CEO, bureau senior managers and other staff, volunteers

Skills, experience and personal qualities

Each individual member of the TB brings personal and /or professional skills and qualities to the board. In addition they should have

- commitment to the aims, principles and policies of Citizens' Advice, including equality of opportunities, equality and diversity, independence and Research and Campaigning
- commitment to understand how the bureau works, local needs and continuous improvement
- skills to analyse issues, think strategically and solve problems creatively
- good communication and questioning skills, ability to listen positively and appraise critically
- good team and interpersonal skills, ability to build working relationships
- ability to make reasoned decisions and to act honestly, diligently and in good faith in the best interests of the Bureau

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Candidates should be able to demonstrate the above skills, experience and personal qualities through success in private or public sector management/leadership roles, or community, voluntary and other work or education experiences. We realise people with the abilities and qualities to be good, effective trustees come from a wide variety of backgrounds and we welcome applications from them all.

Indication of annual time commitment

- 6 TB meetings (2-3 hours, plus preparation)
- 1 trustee and 2 trustee, staff, volunteer half day strategic meetings
- perhaps membership of a committee (there's only one) or an occasional task and finish group
- individual trustee/Chair meeting (1)
- attendance at the AGM (evening, c.2 hours)
- new trustee induction (perhaps 2 half days) – in the Bureau and CiTA
- occasional other trustee training events and CitA meetings

Eligibility

- a person is ineligible to be a trustee if they are an un-discharged bankrupt or have been sentenced to a term of imprisonment (suspended or not) for a period of not less than three months within the past 5 years, or of not less than two and half years within the past 20.
- staff or volunteers at CAY may not be appointed as members of the TB.

Other Requirements and points to note

- observe the Code of Conduct for TB members
- sign and comply with the CAY confidentiality agreement
- complete and keep up to date a declaration of interests for inclusion in the Register of Members' Interests, which is open for public inspection on request
- commitment to a 3 year term of office
- if necessary appropriate expenses (consistent with the CAY staff expense policy) may be paid when agreed in advance with the Chair