

## **Citizens Advice Oxford**

### **Trustee Role Description**

**Last updated:** July 2022

### **About Citizens Advice Oxford**

Citizens Advice Oxford's highly trained volunteers and paid staff provide free, confidential, and impartial advice services for everyone in the Oxford City area. See our website at <https://www.citizensadviceoxford.org.uk/> for further details, including stories of the ways in which we have been able to help our clients in the last year. We also speak with decision makers using the wide evidence base we collect to inform and improve policy and practices. You can find more information at <https://www.citizensadviceoxford.org.uk/> and on the [Charity Commission website](#)

### **Main duties and responsibilities of Trustees:**

Each individual member of the Trustee Board has a responsibility to contribute to the effective discharge of the Board's duties. They can do this by:

- Maintaining an active understanding of what Citizens Advice does
- Actively contributing to setting policy and strategic direction, defining goals, setting targets and evaluating performance
- Actively using their knowledge, experience and professional or community networks to support the organisation's development
- Monitoring whether the service complies with its governing document, whether it meets Citizens Advice standards and how well the advice needs of the local community are being met.
- Monitoring the financial position and ensuring operation is within means and objects, and that there are clear lines of accountability for day-to-day financial management.
- Supporting the development of the organization through participation in agreed projects and sub-groups
- Actively seeking to further the strategic objectives of the organisation, and acting in the best interests of Citizens Advice at all times
- Alerting the Chief Officer to funding opportunities and using any personal contacts that might assist in generating funding or partnerships for the organisation
- Maintaining confidentiality about any sensitive or confidential information received in the course of duties as a trustee.
- Identifying experience and skill sets relevant to the wider Board activity and using them to support the goals of Citizens Advice.

### **Personal skills and qualities:**

Each individual member of the Trustee Board brings skills and qualities to the Board. They add to the collective knowledge and experience by being:

- Committed to the goals and aims of Citizens Advice
- Constructive about other Trustees' opinions in discussions (and in response to staff members' contributions at meetings)
- Able to maintain confidentiality on sensitive and confidential information
- Understanding of the importance and purpose of meetings, and being committed to preparing for them adequately and attending them regularly
- Able to analyse information and, when necessary, challenge constructively
- Able to make collective decisions and stand by them
- Able to communicate effectively and willing to participate actively in discussion
- Willing to gain knowledge of local needs and resources
- Committed to equality and diversity
- Willing and ability to act in the best interests of the organisation
- Able to understand and accept their responsibilities and liabilities as trustees and employers
- Able to think creatively and strategically, and exercise good, independent judgement
- Able to work effectively as a member of a team
- Willing to comply with charity law and actively seeking to understand any changes in the law.

### **Other Information:**

- Meetings are held approximately every two months in the late afternoons either in central Oxford or online.
- The role requires approximately 4-8 hours work per month at a minimum; sub-group or committee work and other activities may require a considerably greater time commitment.
- Trustees are expected, where possible, to attend workers' meetings, away days and other activities that support the work of Citizens Advice Oxford.. Trustees are expected to attend the annual AGM in September or October.
- Trustees are expected to join at least one subcommittee or sub-groups (at present the sub-groups are: Governance and People; Research and Campaigns; Strategy; Finance & Risk; Trustee Nominations).
- Trustee Board members are elected at the AGM and are expected to serve for a period of three years.
- This is an unpaid position and only out of pocket expenses can be reimbursed to Trustees.