



# **Hillingdon and Ealing Citizens Advice**

AREA SUPPORT OFFICE, Key House, 106 High Street, Yiewsley, Middlesex UB7 7BQ

## **Treasurer/Trustee**

### **Hillingdon & Ealing Citizens Advice Bureau**

## **CANDIDATE INFORMATION PACK**

**Applications should be sent to:**  
[DougBird@hillingdoncab.org.uk](mailto:DougBird@hillingdoncab.org.uk)

## **Contents**

## **Page**

Introduction – **A message from the Chair**

Page 3

Background to the Organisation

Page 4

Overview of the Role

Page 5

Main Duties and Responsibilities

Page 5

Key Skills and Qualities

Page 6

Application for the Post

Page 7

Equal Opportunities

Page 12

Equal Opportunities Monitoring Form

Page 13

# A Message from the Chair

Dear Candidate,

Thank you very much for your interest and taking the time to enquire about what I believe is one of the most rewarding activities I have ever undertaken.

Becoming a Trustee with Hillingdon & Ealing Citizens Advice (HECA) demonstrates a commitment to empowering the community by providing access to the knowledge and resources that every citizen should have a right to receive and yet, many are denied.

In particular, following the impending retirement of our long servicing and successful Treasurer, we urgently need a Treasurer to take us forward as we face not just an election, but a continuing re-evaluation of the funding parameters for social justice.

I can assure you that you will have our full support and all the assistance you might need to maximise your potential, while also gaining a lot of personal satisfaction, new contacts and new ideas.

Please complete and send the attached application and equal opportunities forms and we will respond as soon as possible.

I hope we will meet shortly.

**Norman Beazant**

Chair of Trustees Board

# Background to the Organisation

**Hillingdon & Ealing Citizens Advice Bureau (HECA)** provides the advice people need for the problems they face in areas such as debt, welfare benefits, employment, tax, consumer rights, housing and immigration. It's free, independent, confidential and impartial and accessible to everyone. We also aim to improve the policies and practices that affects their lives. HECA is a registered charity making a real difference to the lives of its community by providing advice face-to-face through three local bureaux, as well as via telephone and email services and through the self-help website [www.adviceguide.org.uk](http://www.adviceguide.org.uk)

For more information visit <http://www.citizensadvice.org.uk/index/aboutus.htm>

## Size and composition of the Board of Trustees

In legal terms Hillingdon & Ealing CAB consists of the [12 to 15] members [of the Trustee Board] which has collective responsibility for the overall performance and success of the Charity.

The Board currently comprises 8 trustee members, 2 co-opted members and 3 local authority representatives.

### Location

Board meetings normally take place in the Borough of Hillingdon (Yiewsley or Uxbridge) although the role is not specifically based in any one of our offices. Trustees therefore need to be able to attend meetings and events, mostly held in the Borough, on approximately 6 to 10 days a year.

**Please note: For your application to be considered, please complete these forms and return them with your Curriculum Vitae and any supporting letter to [DougBird@hillingdoncab.org.uk](mailto:DougBird@hillingdoncab.org.uk)**

Or post to:

Doug Bird  
**Hillingdon & Ealing Citizens Advice,**  
**Area Support Office,**  
Key House,  
106 High Street,  
Yiewsley,  
Middlesex  
UB7 7BQ

## Overview of the role

HECA is ready to meet the challenges ahead, but our retiring Treasurer wants a replacement who is an experienced senior finance professional with a passionate belief that everyone has an equal right to free advice and information.

As a Trustee, you will provide advice and support in the strategic development and day-to-day running of the organisation, monitoring whether the service complies with its governing documents and meets required Citizens Advice standards.

Training is provided at no charge where it is necessary for your development as a member of the Trustee Board. Training may be held locally or in London and may be provided by Citizens Advice, other recognised agencies or “in house” tutors.

Reasonable travel expenses are paid to Trustee volunteers for travel to Management Committee Meetings, training, etc.

### **Main duties and responsibilities of the Treasurer**

The role of Treasurer, in addition to being a Trustee, will be to monitor the financial administration of the charity, managing and forecasting its finances and advising the Board of Trustees on its state of financial health, in line with best practice, and in compliance with the Charity Commission requirements. These will include:

- 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

- Liaising with external auditors on any changes to financial control systems & the production of the annual accounts.
- 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 Director about financial matters and offering advice and support when required
- 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.
- To be involved with the recruitment of senior finance staff as and when required.

### **Personal skills and qualities**

- A qualified accountant ideally with knowledge and experience of charity accounting
- High standards of professionalism, integrity and objectivity
- Knowledge of the Charity SORP, including the impending changes
- A confident and adaptable individual with the ability to support Trustees and staff
- Experience of commercial financial management
- Ideally with fundraising experience

The Treasurer will be expected to attend four evening Board meetings a year and to regularly attend, chair and contribute to the monthly Finance and Staffing Sub-Committee meetings. However, the current Treasurer is committed to supporting the successful applicant during the transition.

Please complete the forms below and send with cover letter to [DougBird@hillingdoncab.org.uk](mailto:DougBird@hillingdoncab.org.uk)

Shortlisted candidates will be interviewed by a panel of trustees and the successful candidate will be recommended to the full Board for approval subject to appropriate checks and references.

## Application for the post of Treasurer/Trustee

Note: Please complete this form in **black ink**, to enable clear photocopying

### APPLICATION FOR APPOINTMENT

Please specify post : \_\_\_\_\_

Surname: \_\_\_\_\_

First Names: \_\_\_\_\_

Tel Home: \_\_\_\_\_

Home Address: \_\_\_\_\_

Tel Work: \_\_\_\_\_

\_\_\_\_\_

E-mail: \_\_\_\_\_

\_\_\_\_\_

May we contact you at work? Yes/No

\_\_\_\_\_

### REFERENCES

Please give below the names and addresses of two referees.

#### First Referee

(current or most recent employer)

#### Second Referee

Name.....

Name.....

Position Held.....

Position Held.....

Address.....

Address.....

.....

.....

.....

.....

.....

.....

Tel. no. ....

Tel. no. ....

E-mail: .....

E-mail: .....

If you are shortlisted, may we take up your references before interview? Yes/No

### NOTICE

If applicable, what period of notice are you required to give? .....

Your completed application and/or any enquiries relating to your application should be addressed to:

**Hillingdon & Ealing Citizens Advice, Area Support Office,  
Key House, 106 High Street, Yiewsley, Middlesex UB7 7BQ (Tel: 01895 422479)**

Please mark any correspondence 'Private and Confidential'.

**1. Relevant Paid and/or Unpaid Work Experience**

This may include your current/previous employment (including job training schemes), school placements, voluntary work, community activities and life experiences (continue on a separate sheet if necessary). Please put in date order, starting with the most recent.

Dates From To	Employment/Voluntary Work etc. (give full name of organisation and your job title/role)

## 2. Education and Training

Please list your education and training (including short courses). Continue on a separate sheet if necessary.

Dates		Nature of Course / Qualifications Gained
From	To	

## 3. Reasons for Applying

Give reasons for applying for this job demonstrating how you meet each of the criteria listed in the **person specification**, giving examples of your relevant skills, abilities and experience.

Taking **each point** of the person specification in turn, please give specific information that demonstrates how you have the skills and abilities needed for this post.

Any additional information which you wish to provide should be limited to no more than two sides of A4 paper.

#### 4. Miscellaneous

Do you hold a current full driving licence? YES/NO

Do you speak any languages in addition to English?  
(please list) \_\_\_\_\_

Have you been interviewed and tested for a post with HECA previously? YES/NO  
If yes, in which year and month?

Are you entitled to work in the UK? YES/NO

How did you learn of this vacancy? \_\_\_\_\_

#### **Criminal convictions**

Have you had any previous convictions not regarded as spent under the Rehabilitation of Offenders Act 1974? YES/NO

If 'yes' please provide details of the offence and the date of conviction.

**Please note: for this post a basic Disclosure and Barring Service (DBS) Certificate will be necessary.** However, the Citizens Advice service is committed to the promotion and delivery of equal opportunities to staff and so has a policy to ensure ex-offenders are not discriminated against.

All offences, other than sexual crimes against a child or vulnerable adult, will be treated on an individual basis taking into account issues such as the risk to the client, the circumstances of the offence (e.g. what it was, is it relevant to role, how long ago it was) and the reputation of and risk to the bureau.

#### **Data Protection Act 1998**

As part of the recruitment procedure we may collect and store sensitive personal data about you. We are required by law to obtain your consent to such data being recorded. It is our policy to store data relating to recruitment procedures for 18 months after the date on which it is submitted, for internal auditing purposes. Any information of this nature will be treated confidentially.

Sensitive personal data is defined as information relating to any of the following: racial or ethnic origin, political opinions, religious beliefs, trade union membership, health, sexuality or sex life, offences and/or convictions.

For the purposes of the Act, Data Controller is Hillingdon and Ealing Citizens Advice Ltd.

**DECLARATION**

I declare the information given on this form is correct to the best of my knowledge and acknowledge that by signing this form I give my consent to sensitive personal information being recorded and stored by HECA Ltd.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Equal Opportunities



**The CAB service is committed to equal opportunities for all.**

Hillingdon and Ealing Citizens Advice is fully committed to the Service's Equal Opportunity policies. These cover all aspects of the Service, including the way it is provided, the ways people can gain access to it and the way we employ people to work within it.

With regard to recruitment, we aim to ensure that no applicant receives less favourable treatment than another on the grounds of race, sex, disability, HIV/AIDS, sexuality, class, age or any other unfair criterion.

Our recruitment procedures are designed to ensure that all job applicants are considered solely on the basis of their aptitudes and abilities in relation to the requirements of the job.

This includes short listing without reference to personal details. We would, however, request you to complete our equal opportunities monitoring form.

The purpose of this statement is to make clear HECA's commitment to the principles of Equal Opportunities and to assure all applicants that their application will be dealt with fairly. HECA is committed to taking positive action to implement equal opportunities for people facing discrimination and to ensuring that its workforce is representative of the whole community.

# Equal Opportunities Monitoring Form

## Confidential

Please return this with your application form. It will be separated from your application before short-listing. The selection panel will not see this form, which will be used for monitoring purposes only.

**Post applied for** \_\_\_\_\_

**Surname/family name** \_\_\_\_\_

**First name(s)** \_\_\_\_\_

**Gender**                                      **Female**                                       **Male**

**Age** \_\_\_\_\_

**Ethnic Group** (Please indicate which ethnic group you belong to):

<b>White</b>	<b>Mixed</b>	<b>Asian or Asian British</b>	<b>Black or Black British</b>	<b>Gypsy / traveller</b>	<b>Chinese or Other Ethnic Group</b>
British <input type="checkbox"/>	White and Black Caribbean <input type="checkbox"/>	Indian <input type="checkbox"/>	Black Caribbean <input type="checkbox"/>	Gypsy / traveller <input type="checkbox"/>	Chinese <input type="checkbox"/>
Irish <input type="checkbox"/>	White and Black African <input type="checkbox"/>	Pakistani <input type="checkbox"/>	Black African <input type="checkbox"/>		Other Ethnic Group <input type="checkbox"/>
Other White <input type="checkbox"/>	White and Asian <input type="checkbox"/>	Bangladeshi <input type="checkbox"/>	Other Black <input type="checkbox"/>		
	Mixed British <input type="checkbox"/>	Other Asian <input type="checkbox"/>			
	Other Mixed <input type="checkbox"/>				

## **Disability**

Do you have a disability?    Yes                                       No