

# Trustee with fundraising experience

We're a respected local charity that gives free, confidential and impartial advice. We're looking for someone with a background in fundraising to help us secure the income we need to develop our work in east Elmbridge, Surrey.

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## What will you be doing?

### **About our Organisation**

Citizens Advice Esher & District is an independent charity and part of the Citizens Advice network. We provide free, confidential and impartial advice, and campaign on a wide range of issues affecting people's lives. People come to us with all sorts of problems. These may be related to money, benefits, housing or employment issues. Our clients may be facing a crisis, or just considering their options. Our goal is to help everyone find a way forward, whatever problem they face.

### **About your role as a trustee**

As the cost of living crisis bites, people need our advice now more than ever. To help us develop our service for the local community we need trustees who can provide us with strategic thinking and ensure that we have the resources in place to go forward.

We do not receive any central government or national funding and are totally reliant on local funding and fundraising. We work hard to control and cover our expenditure, but this is becoming more difficult as we face inflationary operating costs at the same time as an increase in the number of people asking for our help. This year we need to raise over £100,000 from individual donations, local funders and project partners to keep our vital local service open and reach out to those most in need in east Elmbridge.

As our fundraising expert on the Board, you will join our established Fundraising sub-committee to:

- Act as a 'sounding board' for the Chief Executive and Volunteer Fundraising Lead on any questions relating to grant applications and bid work
- Input to the further development of our funding strategy
- Advise on how best to ensure existing funders' interests are served
- Advise on potential new income streams

In your wider remit as a general trustee, you will be responsible for:

- Maintaining an awareness of how the charity is operating
- Reading papers for Board meetings and attending six Board meetings per year
- Working on specific projects with other trustees or staff to further the strategic objectives of the charity
- Taking an active discussion during Board meetings and working with other trustees to:
  - set policy and strategy direction, set targets and evaluate the performance of the charity
  - monitor the financial position of the charity, ensuring that it operates within its means and objectives
  - monitor how well the service meets the needs of the local community
  - ensure that the service plans for the recruitment of staff and volunteers
  - review the Board's own work.

### **Availability**

On average local Citizens Advice trustees spend around 6 - 10 hours every month undertaking trustee business. This includes attendance at Board meetings, which are scheduled every other month on Monday evenings, and quarterly sub-committee meetings. (The Board meetings are usually a mixture of 'in person' and Zoom calls; the sub-committee more usually meets in person). Outside these meetings, you may be asked to work on specific projects, give additional support to staff or undertake training relevant to your role.

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## What are we looking for?

### **Ideally, we need someone who has some connection with Elmbridge and who has:**

- Experience of fundraising or income generation, ideally in the charity sector
- A commitment to the values of Citizens Advice and interest in the work we do
- A willingness to devote the necessary time and effort
- Strategic vision
- Good, independent judgement
- An ability to think creatively
- A willingness to speak their mind
- An understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship
- An ability to work effectively as a member of a team

We are keen to achieve a more diverse Board and welcome applications from all sections of the community and different backgrounds who will bring enthusiasm and a fresh perspective. Experience of Citizens Advice work is not required.

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## What difference will you make?

Your leadership and commitment can help us to meet the changing advice needs of our community in these challenging times.

More specifically, your input will help us to achieve a sustainable future. Without more funding, we risk having to cut our service to local residents and workers - and the most vulnerable members of society will have nowhere else to turn.

In return for your time you will enjoy the benefits of:

- Joining a friendly, committed and engaged board, which is keen to welcome new members.
- Receiving full training - new trustees are allocated a mentor as part of our induction process and have access to bespoke Citizens Advice leadership training.
- Building on valuable skills to add to your CV.
- Making a positive impact in your community.