

**Trustees – HR/EDI and Fundraising**

Citizens Advice are seeking dedicated and passionate individuals to join our Board of Trustees with expertise in any two from three areas of expertise: Human Resources, Equality, Diversity, and Inclusion (EDI), and Fundraising. As a Trustee, you will play a pivotal role in shaping the strategic direction of our organisation, offering guidance and support in key areas such as HR practices, EDI initiatives, and fundraising efforts. We are looking for individuals who are committed to making a positive impact and who bring valuable skills and insights to help us achieve our mission and ensure the sustainability and growth of Citizens Advice Liverpool.

While previous governance experience is welcome, it is not essential. We provide a full induction and training to all out Trustees so if you have a passion for HR/ EDI or fundraising and want to make a difference in your community, we encourage you to apply.



**What will you do?**

* Maintain an awareness of how Citizens Advice Liverpool is operating
* Read papers for board meetings and attend 6 meetings per year
* Work on specific projects with other trustees or staff within Citizens Advice Liverpool to further the strategic objectives of Citizens Advice Liverpool
* Take an active discussion during board meetings and work with other trustees to:
* *set policy and strategy direction, set targets and evaluate the performance of Citizens Advice Liverpool*
* *monitor the financial position of the Citizens Advice Liverpool ensuring that it operates within its means and objectives*
* *ensure that all the finances and supporting financial control systems of the local Citizens Advice are in order including that full financial records are kept for all transactions, that money is only spent for the purpose given, and that proper financial controls are in place to safeguard the organisation’s resources*
* *monitor the financial position of the local Citizens Advice ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management*
* *seek the views of all sections of the community and monitor how well the service meets the needs of the local community*
* *ensure that the service plans for the recruitment and turnover of staff and volunteers*
* *review its own work and how effectively it operates including action for improvement*

**Key Responsibilities for HR**

* Provide HR expertise to support the governance of Citizens Advice Liverpool
* Advice on HR strategy, policies, and practices, ensuring they align with legal and ethical standards
* Support recruitment, retention and professional development strategies for Citizens Advice Liverpool paid staff and volunteers
* Ensure that the organisation’s HR practices align with its diversity, equity, and inclusion goals.
* Ensure compliance with employment law and best practice in HR matters.

**Key Responsibilities for EDI**

* Provide strategic guidance on the development and implementation of the organisation’s EDI policies and initiatives.
* Champion EDI within the organisation, advocating for inclusive practices and the promotion of diversity at all levels.
* Engage actively with fellow trustees to ensure EDI is a priority in board-level discussions and decision-making.
* Provide guidance on best practices for building an inclusive environment for all staff, volunteers, and service users.
* Report regularly to the board on the effectiveness of EDI initiatives, providing recommendations for improvement.

**Key Responsibilities for Fundraising**

* Lead and contribute to the development of effective fundraising strategies aligned with the organisation’s mission, goals, and financial needs.
* Assist in planning, executing, and monitoring fundraising campaigns
* Ensure proper oversight of fundraising revenues, ensuring compliance with legal and regulatory requirements and tracking financial performance to meet targets.
* Act as an ambassador for the organisation, promoting its mission, programs, and impact to potential donors, partners, and the public.



**What’s in it for you?**

* A chance to make a positive impact for people in your local area by ensuring the local Citizens Advice is sustainable and meeting the needs of the community
* You will meet people and build relationships with trustees, staff and other volunteers
* An opportunity to grow your governance, leadership and strategy skills
* Develop skills to increase your employability

And we’ll reimburse expenses too.



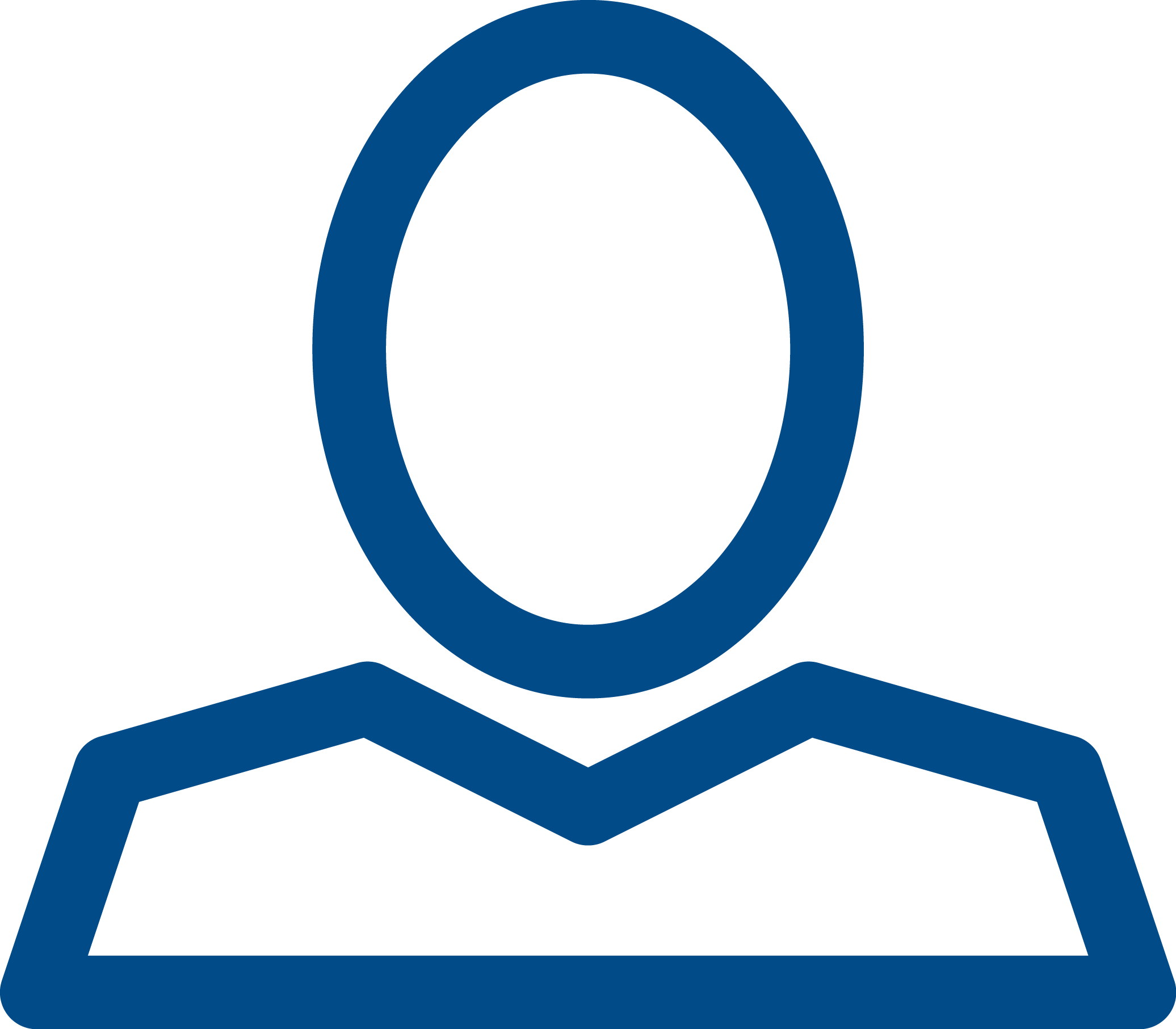
**What do you need to have?**

* Understand and accept the responsibilities and liabilities as trustees
* Be non-judgmental and respect views, values and cultures that are different to your own
* Have good listening, verbal and written communication skills
* Be able to exercise good independent judgement
* Be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
* Have a genuine passion for our mission of providing free, confidential, impartial and independent advice.
* Bring energy, enthusiasm and commitment to the role, broadening the diversity of thinking on Citizens Advice Liverpool’s board



**How much time do you need to give?**

Trustee boards usually meet in the evenings and you’ll likely need to give is 4 hours per month and you may need to attend other meetings if you’re involved in specific projects, or meet with volunteers and staff occasionally within the local Citizens Advice. We can be flexible about the time spent and how often you volunteer so come and talk to us.



**Valuing inclusion**

We are committed to developing a diverse and inclusive Board of Trustees that reflects the communities we serve. We believe that increasing the diversity of our board will enhance our ability to deliver meaningful and effective services.

We particularly encourage applications from people who are currently underrepresented on our board, including individuals from communities of colour, disabled people, those with physical or mental health conditions,

LGBTQIA+ people, and individuals with diverse gender identities. We welcome candidates from all social economic backgrounds and value the perspectives and experiences they bring



**Contact details**

For any questions or further information please contact [**recruitment@caliverpool.org.uk**](mailto:recruitment@caliverpool.org.uk)