

Trustees' Role Outline and Background Information

What does Citizens Advice do?

Citizens Advice South Somerset is an independent advice charity and a member of the National Network of Citizens Advice. We provide free, confidential and impartial advice for anyone that needs it.

Our vision is to deliver excellence in prevention and advice services, helping clients prepare for, and manage through, key life events and change.

Our services benefit the whole community and our goal is to reduce poverty, disadvantage and discrimination, improving people's independence, prosperity and wellbeing.

The Board of Trustees

As an independent charity and not for profit- company we are governed by a Board of Trustees who serve as volunteers giving their time and expertise freely. The Board are responsible in law for managing the organisation and ensuring that we operate effectively and to high standards of professional practice. The Board work with the CEO to set the strategic direction of the organisation and to provide public accountability for the work that we do.

The Board members are local people who represent our community. Each member brings different skills, expertise and perspectives into their role and together we have specialist knowledge on a variety of relevant matters (charity finance, personnel management, legal issues and advice delivery). We would be very pleased to hear from anyone with a background in marketing, IT or fundraising.

The Chair

The Chair of the Board of Trustees provides leadership and support to the Board and the CEO. The Chair acts as the Trustees' representative and is a named contact for the organisation along with the Treasurer and the Vice Chair.

Trustees' Role Outline



What will you do?

- complete an introduction for your role
- maintain an awareness of how the local Citizens Advice is operating
- read papers for board meetings, attend an average of 6 formal meetings per year and participate in follow up activities or task and finish groups as appropriate
- work on specific projects with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice

Training and support is available and we welcome trustees onto the Board who will help us to maintain a diverse membership that reflects the interests of our local community.

In a very practical sense you will take an active role during board meetings and work with other trustees to:

- ❖ set policy and strategy direction, set targets and evaluate the operational effectiveness of the organisation
- ❖ maintain an awareness of the business of the organisation and its stakeholders
- ❖ monitor the performance of the organisation ensuring that it operates within its means, contractual specifications and charitable objectives
- ❖ ensure that all the necessary control systems are in order (financial, health and safety, information assurance etc)
- ❖ support the development of the organisation in accordance with our aims and values
- ❖ oversee and review how well the service meets the needs of the local community
- ❖ ensure that the organisation makes robust plans for the recruitment and turnover of staff and volunteers
- ❖ review the impact of our work and oversee the implementation of actions for improvement



What's in it for you?

- make a positive impact for people in your local area by ensuring that Citizens Advice South Somerset is sustainable and meeting the needs of the community
- meet people and build relationships with other trustees, staff and other volunteers
- build on your governance, leadership and strategy skills
- increase your employability

And we'll reimburse expenses too.



What do you need to have?

You don't need specific qualifications or skills but you'll need to:

- 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 communication skills
- be able to exercise good independent judgment
- be confident using IT, cloud-based systems and online meeting platforms
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
- be willing to undertake training in your role



How much time do you need to give?

The Board usually meets in the evenings from 5.00pm (our meetings currently take place via an online meeting platform). On average you'll likely need to give a couple of hours a week to your role although this does vary. Typically ahead of Board meetings there are papers to read and comment on or items to prepare in order for the Board to hold thorough discussions. You may need to attend other meetings if you're involved in specific projects or meet with volunteers and staff occasionally. In between meetings you will need to check your emails regularly and undertake any actions you have agreed.



Valuing inclusion

Our volunteers come from a range of ages and backgrounds and we particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black Asian Minority Ethnic (BAME) communities.

If you are interested in becoming a trustee and would like to discuss what this might mean to you and how we can support you please contact us.



Contact details

Angela Kerr, CEO, 01935 847661 or email angela@citizensadvicesouthsomerset.org.uk

To apply please refer to the Trustee Recruitment Pack which contains the following:

Code of Conduct for Citizens Advice South Somerset Trustees

Application Form

2020 – 2023 Business Plan