

# Candidate Pack Trustee (Tech and Digital)

citizens  
advice



# Welcome

Dear applicant

Thank you for your interest in becoming a trustee. At Citizens Advice we exist to give people the knowledge and confidence they need to find their way forward – whoever they are, and whatever their problem. Founded in 1939, our national charity and network of local charities offer confidential advice online, over the phone, and in person, for free. We're here for everyone and we're relied on because we're totally impartial.

We provide advice to people with many different kinds of problems. This gives us a uniquely deep insight into the challenges people are facing today, in an era of uncertainty and challenge. With the evidence we gather, we can show big organisations – from companies right up to Government – how they can make things better. We therefore have a significant role to play in influencing services and policy making across the UK, driving and shaping the thinking and decisions that stand to benefit people everywhere, now and in years to come.

To meet increasing demand for our online advice services, and ensure we reach all our audiences, we're transforming our digital capability at Citizens Advice. We're looking for a new Trustee with a background and deep professional experience in Tech and Digital. You will help us consider issues relevant to the development of new infrastructure and ensure we think innovatively about how we can have our desired impact in a new era of communication and access.

This is a fantastic platform at an unrivalled moment in our organisation's development: your experience will guide us to consider major issues associated with developing and operationalising new technologies across a large and dispersed workforce.

You've probably worked as CIO or CTO in another large service-oriented organisation that has transformed the way it delivers to customers and are looking for new ways to add value through your knowledge and personal experiences. You will see this role – because of the scale, reach and complexity of Citizens Advice – as the perfect place to bring your influence and personal impact to bear. Effective team-working, communication and interpersonal skills are important for this role: you will be a clear strategic thinker with excellent technical know-how balanced with judgement and independence.

Equity, Diversity and Inclusion (EDI) is of strategic importance within the organisation and recognised as integral to all we do as a service. Central to pursuing our EDI mission is building a diverse and inclusive organisation in which everyone has a sense of belonging. We're committed to creating an equitable, diverse and inclusive workplace, where all our colleagues feel valued and respected, and where we're reflective of the communities we serve. Equality disparities lead many of our clients to seek our services. So we are committed to increasing the diversity of background and thinking on our Board.

If you believe you can bring the experience, capability and attributes we're looking for, we very much look forward to hearing from you.



**Jabbar Sardar**  
Deputy Chair of the Board



**Honestly Citizens Advice is such an important service at the moment. I don't think they realise just how important they are to people out there... having that extra energy and council tax help, it has taken the worry away. It takes the pressure of thinking, if the extra money hadn't come in, what would I have done?**

**Lucy, Client**



# About our organisation

The Citizens Advice service offers free, confidential advice online, over the phone and in person. We give people the knowledge and confidence they need to find their way forward—whenever they are, and whatever their problem. We're independent and impartial.

Citizens Advice is a network of around 250 independent local charities across England and Wales. Our services are provided by 11,000 local volunteers, 1,900 Witness Service volunteers, and 7,800 local and 1,000 national paid staff. We're in 1,870 community locations (including GP surgeries, libraries and courts) in England and Wales.

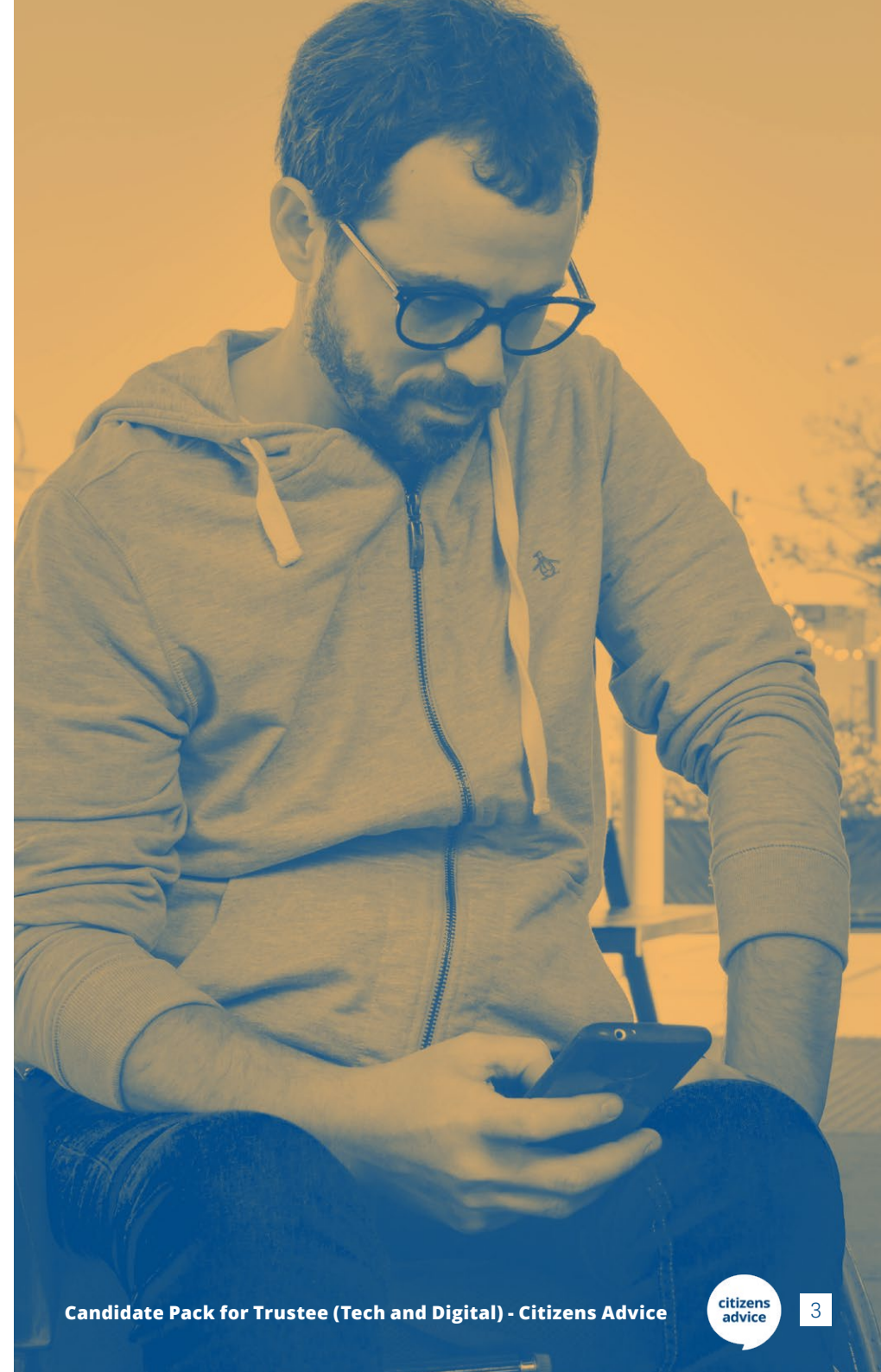
Through the training, information systems and operational support it provides, national Citizens Advice equips local Citizens Advice to deliver the highest quality advice to their community. Each local Citizens Advice is a member of the national Citizens Advice charity. All together we form the Citizens Advice service.

Citizens Advice helped 2.66 million people one-to-one, by phone, email, webchat or in person in 2022-23. Our advice website had over 42.7 million visits and 60.6 million page views.

We supported 80,000 witnesses in courts through the Witness Service and gave pension guidance to people aged over 50. We're also the statutory consumer watchdog for the energy and post industries, meaning we advocate on behalf of consumers in these markets.

We have real time data from our millions of clients. This evidence helps us identify emerging issues, understand what is causing them and make recommendations to policymakers on how to fix the problems.

Three in every four people who sought our help last year had their problem solved. Helping people solve their problems can stop issues getting worse and can save money further down the line. In 2021-22 we saved government and public services at least £717 million.



## Our strategic direction

Our vision is to shape a society where people face far fewer problems.

Our Future of Advice strategic framework 2019-2023 set the direction and provided the parameters within which we've continued to innovate, improve and adapt to provide people with the help they need.

We consciously developed a strategic framework, as distinct from a fixed strategy, to give us the flexibility to adapt to a rapidly changing world.

To keep delivering on our ambitions, we continually transform the way we do things, adapt to meet the changing needs of our clients, keep pace with rapid technological advances, and stay ahead in an increasingly challenging funding environment.

Originally the Future of Advice strategy was intended to run from 2019-2022, and we made the decision to extend this framework for an extra year to give us the time necessary to develop a new strategy for the whole service.

During the lifetime of that strategy we achieved transformational impact across the service. This included, amongst many other achievements, establishing our partnership with the Trussell Trust to help those in crisis, successfully helping almost 200,000 people a year to claim Universal Credit through our Help to Claim service, and responding to an unprecedented pandemic which saw us have to redesign our service model virtually overnight.

Looking ahead, we want to build on our experience of using strategic frameworks, rather than traditional strategies, to create something which is genuinely responsive to the changing environments that we operate and the people we support live in.

As a result in 2022 to 2023 we've been developing a living, or adaptive, strategy. This has seen us dig deep into our fundamentals; our purpose, identity, methods and missions to act as anchors when we're making challenging decisions both day-to-day and in the medium and longer term.

It's been a collaborative, cross-organisation effort and there's more to do through 2023 and 2024 to really bring it to life for our colleagues, the people we help and our partners and funders.





## Equality, diversity and inclusion

Equity, diversity and inclusion (EDI) is integral to all we do as a service, not only for the people we help, but also for our volunteers and staff.

We seek to research and understand how issues in society impact on our volunteers, staff and the people we help in different ways, and we aim to ensure that the diversity of needs among our clients, particularly those from marginalised groups, is taken into account.

Our research shows that groups marginalised by society are disproportionately affected by societal issues such as benefits, housing, employment and household finances. The pandemic shone a light on these pre-existing inequalities and made some of them worse.

Because of these social inequalities and the worsening cost-of-living crisis, we know that marginalised communities are more likely to need our advice, support and advocacy.

This year, Citizens Advice has continued to highlight and work towards addressing the equality disparities faced by clients and our colleagues across the service. We have developed tools to enhance our organisational EDI capability, which is more important than ever during the cost-of-living crisis.

We continue to ensure that EDI is at the heart of strategic planning and decision-making, particularly as we work on our new living strategy.

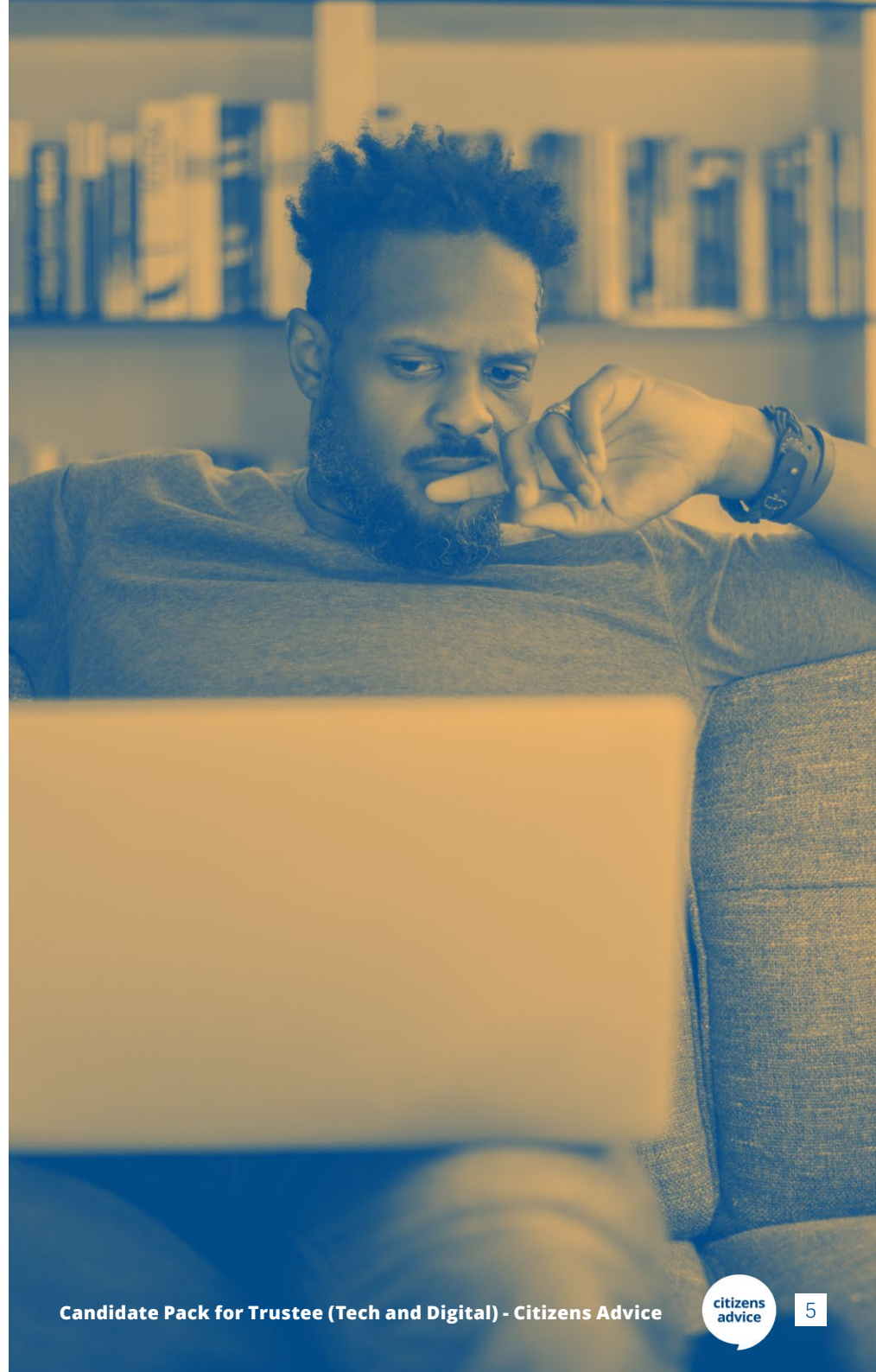
## Find out more

[Visit our website](#)

[Read our 2021-2022 Impact Report here](#)

[Read our 2021-2022 Annual Report here](#)

Footnote: all data above is from our 2021-22 annual report. Our 2022-23 data will be publicly available in November 2023



# The Trustee appointment

Our Board of trustees is collectively responsible for the overall management, governance and strategic direction of the national charity. This includes developing the organisation's strategy in accordance with governing documents, legal and regulatory guidelines. Trustees' skills complement rather than mirror the skills of our executive team. Trustees maintain a strategic focus across the Citizens Advice service and are not involved in day-to-day operational work.

*You must be able to demonstrate the skills required to fulfil the fundamental responsibilities of a trustee, as set out below.*

## Fundamental responsibilities of the trustee board

- **Setting Strategy** Developing and maintaining vision, strategy and clear objectives for Citizens Advice in the long-term best interests of the service's clients.
- **Finance and Budget Matters** Making sure funds are used to further the Trustee Board's vision and objectives. Setting, monitoring and changing budgets, overseeing investments, pensions, accommodation arrangements, signing off the Annual Report and Accounts.
- **Reporting and Monitoring** Overseeing performance management and holding the Executive Team accountable for delivery of the strategy.
- **Leadership** Building strong relationships with local Citizens Advice, funders, government, regulators and the corporate sector to further the Trustee Board's vision and client needs. Demonstrating Citizens Advice values in behaviour and decisions.
- **Setting and Ensuring Standards** Making sure the Citizens Advice service can deliver the vision. Upholding the Membership Agreement by ensuring the local and national performance quality frameworks holds the organisation to high standards.
- **Ensuring Accountability** Being open to challenge and questioning from the Network, listening and consulting with the Network and explaining decisions clearly.
- **Employment** Appointment, appraisal and dismissal of the Trustees and the Chief Executive.



**I can't really put into words... how thankful I am to Citizens Advice. If it wasn't for them I would have just given up.**

**When I first applied they awarded me zero points. I reapplied and was given four points. I knew this wasn't right, so I got in touch with Citizens Advice. They were absolutely amazing, especially my advisor Cathy. She did a mandatory request and asked for my case to go to a tribunal.**

**I received a call from DWP and they said they'd looked at my case and would be giving me the highest personal and mobility award. On top of that they backdated my award for the year, so I received just over £8k and I am about £600 better off a month.**

**I can't really put into words how this money will help me and how thankful I am to Cathy and Citizens Advice. If it wasn't for the Citizens Advice I would have just given up. Cathy worked so hard on this for me and I'm truly thankful.**

**Ray, Client**

# Who we are looking for

## Your knowledge and experience

- A proven record of significant achievement in the field of Tech / Digital is essential for this role. It is likely that you have already worked as CIO or CTO within another large service-oriented organisation that has transformed or developed its digital and tech capability to meet changing customer need.
- You will understand what it means to put people's needs first and how technology can help Citizens Advice to do that in a fast-changing landscape.
- An understanding of how to deliver major transformation projects while ensuring that service to clients or to the public is maintained.
- An understanding of how to develop strategies for increased financial sustainability and of securing funding.
- Experience working with and overseeing internet-era ways of working - understanding the organisational conditions that enable good digital technology work, and the ways in which agile development work can be effectively governed.
- Outstanding influencing skills, and high-level connections in relevant circles of influence and the ability to network at the highest level for the benefit of the Citizens Advice.

*To ensure more diversity at board level we strongly encourage applications from those who are disabled, have caring responsibilities, or are people of colour.*

## Your skills, abilities and personal qualities

- The successful candidate will play an active role in our board committees and must therefore have effective chairing skills.
- A strong empathy and understanding of Citizens Advice and a connection to our mission and vision.
- The ability to drive forward a culture of collaboration and openness, a non- hierarchical approach and the possession of strong diplomacy skills.
- Integrity, authenticity and the ability to act impartially and fairly.
- A collaborative listener.
- Empathetic, passionate and ambitious.





# Terms of Appointment

## Time commitment

Trustees are expected to contribute between 10-14 days per year, including ad hoc activities and advice, often by email or in online meetings. This post is expected to be actively involved in the Board committee structure.

There are six trustee board meetings each year, plus two strategy days and one annual general meeting (AGM).

You will also be matched to serve on an additional committee, matching your skills, experience or areas of interest, which meet three or four times a year.

At Citizens Advice we alternate between in person and online meetings for all of our trustee board and committee meetings.

## Remuneration

This appointment is offered on a voluntary basis with all reasonable expenses incurred as part of the role reimbursed in full.

## Location of meetings

Trustees must be willing to potentially travel as required for any in person meetings that may be held in 1 of our 4 offices – Birmingham, Cardiff, Leeds and London or other locations across England and Wales. Online options are also given.





# How to express an interest in the role

We hope you will consider making an application to join our Board as Trustee of Citizens Advice. To make an application, please go to <https://starfishsearch.com/jobs/ca-trustee-td/> and click on the apply now button, with the following prepared:

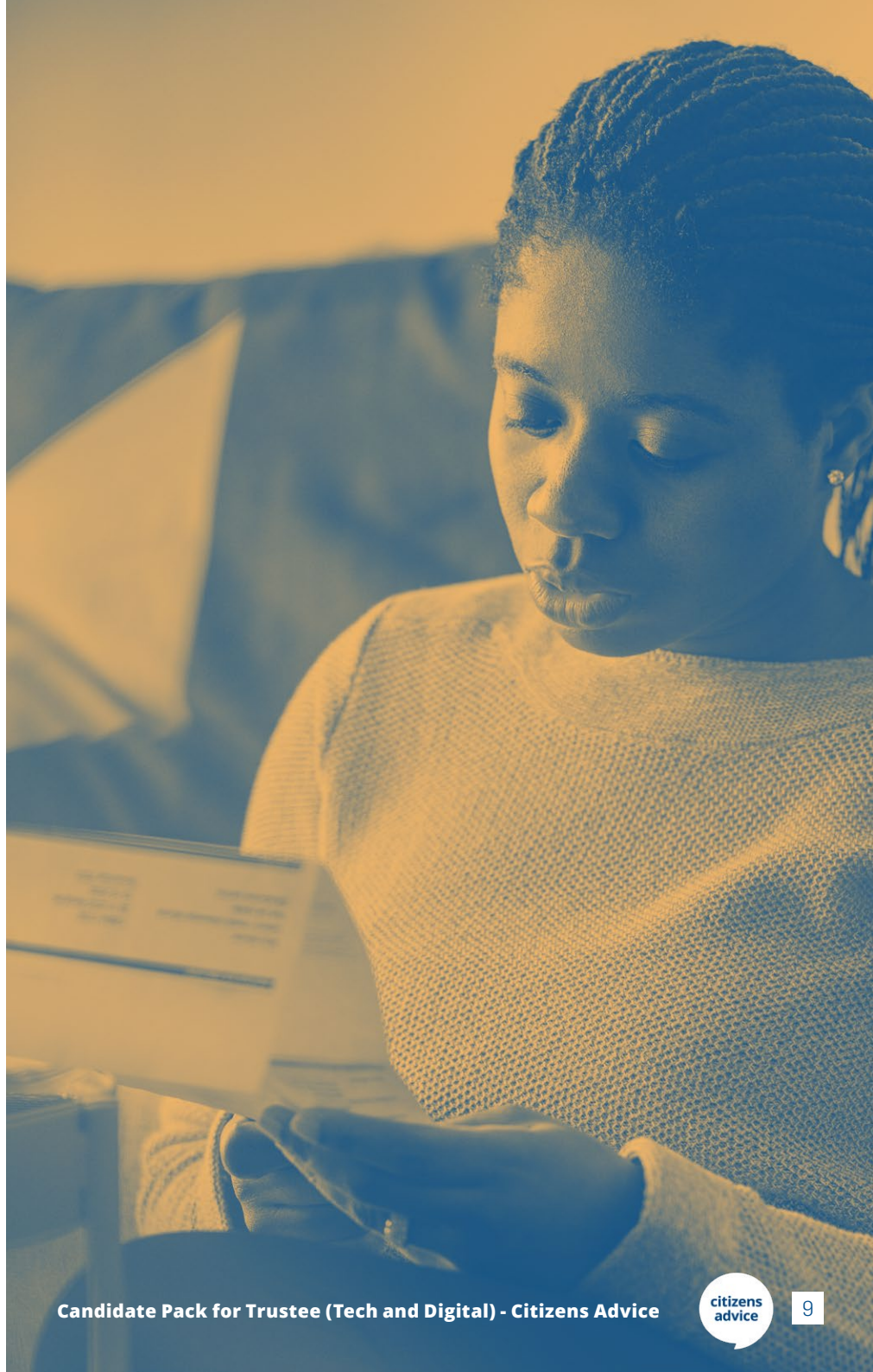
- a CV (no more than three sides) or equivalent biographical information.
- a short covering letter that explains your motivation, suitability, availability and confirms that you would not be subject to any conflict of interest.
- please tell us if there are any dates during the selection process (outlined below) when you would not be available to participate.
- If you have a disability and identify any barriers in the job description or person specification, please tell us.

We would also be grateful if you would also complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

The closing date is **Friday 11th August 2023**.

## Selection Timetable

Closing date	Friday 11th August 2023
First stage discussions	w/c 4th and 11th September 2023
Agreement of the shortlist	Likely to be 22nd or 23rd September 2023
Informal conversations with stakeholders	To follow agreement of the shortlist
Final interviews	Late September 2023 (28th / 29th)



## Forward Board and Committee meeting dates

Trustee board meeting	Tuesday 31st October 2023
Annual general meeting	Thursday 16th November 2023
Trustee board strategy day	Tuesday 21st November 2023
Trustee board meeting	Tuesday 23rd January 2024
Trustee board meeting	Wednesday 27th March 2024
Trustee board meeting	Tuesday 14th May 2024
Trustee board strategy day	Wednesday 19th June 2024

