

Candidate Pack

Local Services Trustee

(Fundraising)

citizens
advice



Welcome

Dear applicant



Thank you for your interest in becoming a Trustee at Citizens Advice. As a network of charities, we're united by a common purpose, which is to shape a society where people face far fewer problems. We're driven by our ambition to make things better for people, individually and collectively. We're driven by the power of good advice, to help people solve their problems. And we're driven to change the underlying causes of problems, through our work with governments and other organisations, to help people face far fewer problems.

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.

Our Board always includes Trustees who have expertise in local services, and with Jonathan Mogford's term coming to an end, we are now looking for a new Trustee with a background in our local services network to bring a depth of understanding. Specifically, you will help bring insight on the current challenges and opportunities of leading or managing a local Citizens Advice service, as well as the different and nuanced issues that each local service faces. Additionally, you may also bring some knowledge or experience in fundraising or partnership-building. This is a fantastic opportunity at an unrivalled moment in our organisation's development: to guide us on local issues across our large and dispersed volunteers and colleagues as part of our national strategic direction.

You've been involved at senior executive or non-executive level with a local Citizens Advice service, and are looking for new ways to add value to our national organisation through your knowledge and personal experiences. You will see this role as the ideal place to bring your experience and insight to bear. Effective team-working, communication and interpersonal skills are important for this role: you will be a clear thinker with excellent local network know-how balanced with judgement and independence. Candidates will be strategic in mindset and provide constructive challenge and steer to both our Board and our committed senior executive team.

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 and 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.

Sarah Wilson, Acting Chair and Matthew Swindells, Chair Designate, Chair from 1st March 2024



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—whatever 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. The service is delivered by our highly trained people, made up of around 16,000 volunteers and 8,843 staff. We're in 1,615 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 79,000 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.

Helping people solve their problems can stop issues getting worse and can save money further down the line. In 2022-23 we saved government and public services at least £681 million.

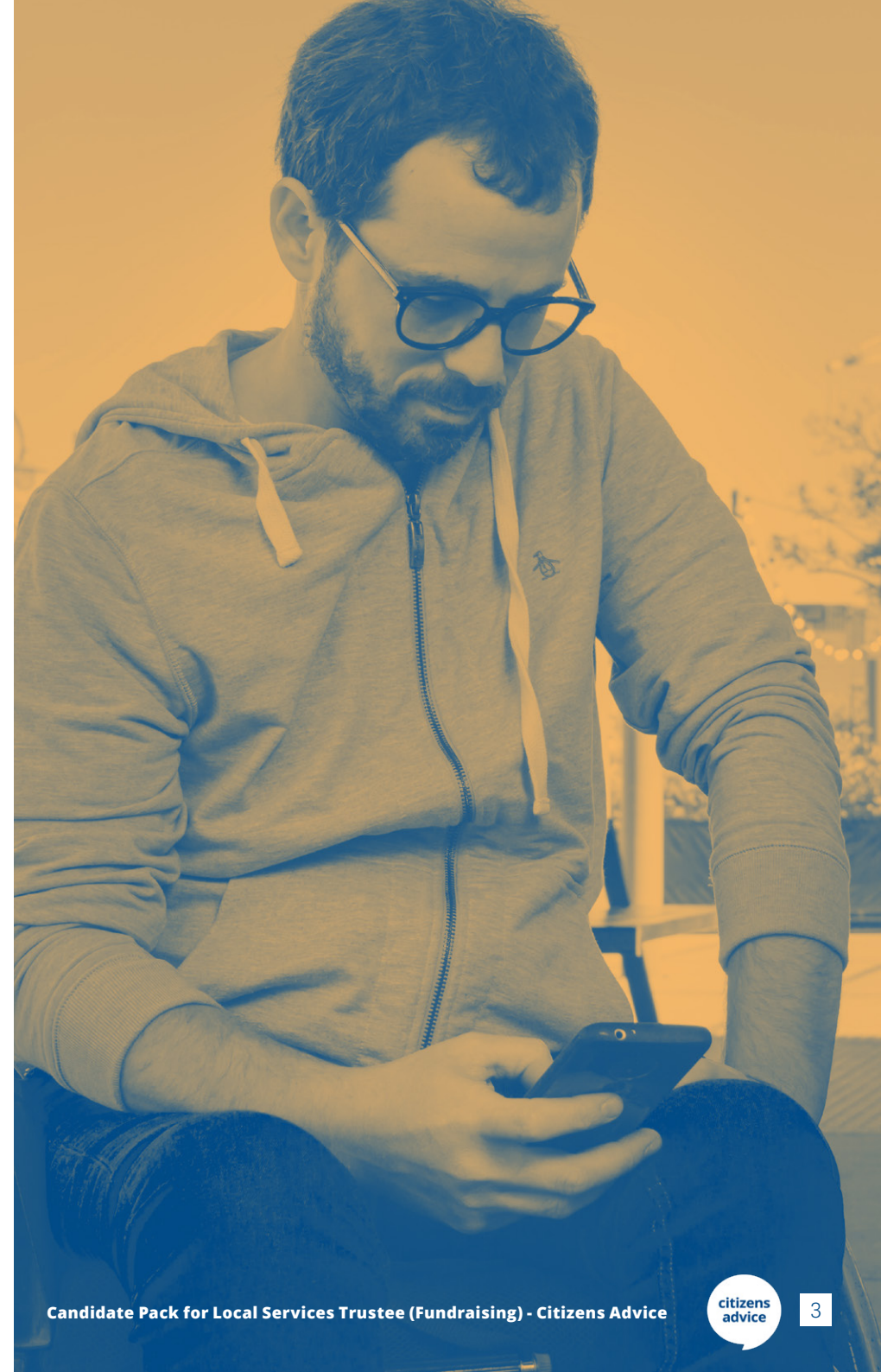
Our living strategy - Transforming together: trusted advice in times of Change

Recent years have been a period of particular hardship for the people we support. It's especially worrying to see the rise in the number of people who simply can't make ends meet and need crisis support in the form of food bank vouchers.

The successive challenges of COVID-19 and the cost of living crisis continue to have deep and widespread ramifications. Our advice isn't enough to make ends meet. Some of our tools and approaches aren't working as they used to, and our service is facing financial pressures.

Our strategy, 'Transforming together: trusted advice in times of change', is a response to these challenges. It will help us transform our service so we can continue to be a positive force for change for individuals, communities and society now and in the future.

The 'living strategy' approach that we've adopted affirms our sense of purpose and direction, allows us to find new ways to respond to challenges, and creates the flexibility to course-correct along the way. This first phase of our living strategy brings together all of those things that define who we are as a service and sets our ambition to extend the reach and impact of our work with clients.



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.

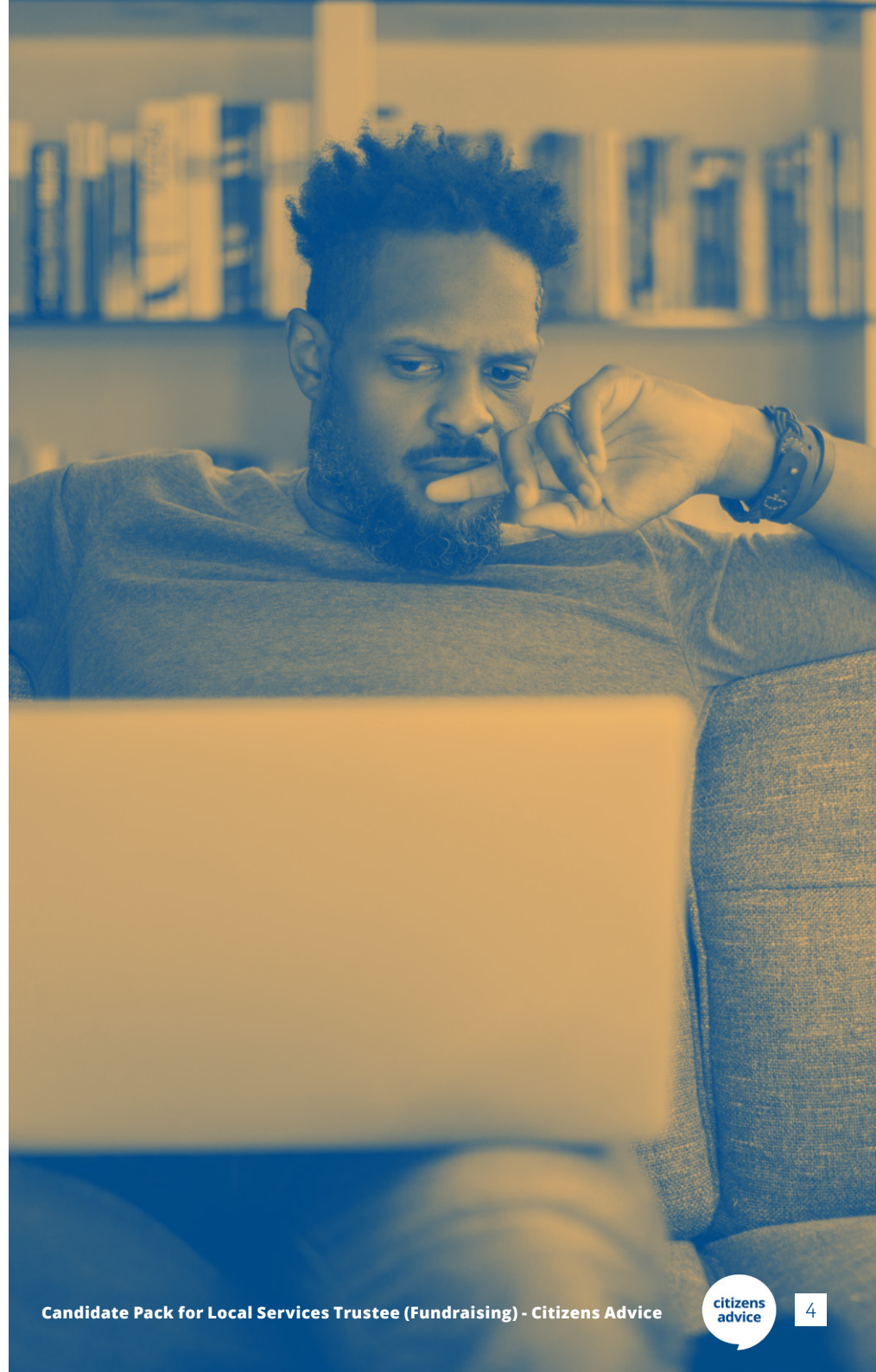
This year, Citizens Advice has continued to highlight and work towards addressing the equality disparities faced by clients and our colleagues across the service. We have developed tools to enhance our organisational EDI capability, which is more important than ever.

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 2022-2023 Annual Report here](#)



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. They work collaboratively with our talented and committed executive team to provide steer and constructive challenge as they develop and deliver the strategy.

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.
- **Legal obligations** Ensuring that the charity complies with its charitable objects at all times, and with the law more generally.
- **Reporting and Monitoring** Overseeing performance management and holding the Executive Team accountable, as well as working closely with them as they progress 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.

Ray, Client

Who we are looking for

Your knowledge and experience

- An understanding of the current challenges and opportunities of leading or managing a local Citizens Advice, and an ability to bring that perspective to enhance national Citizens Advice board discussions, understanding that each local service will have a different perspective.
- An understanding of how to develop strategies for increased financial sustainability and of securing funding.
- Experience of influencing, and of making connections in relevant networks, for the benefit of Citizens Advice.
- Some knowledge and/or expertise of fundraising and partnership-building is desirable.
- Experience of working in or with diverse communities.

Your skills, abilities and personal qualities

- The successful candidate will play an active role in our board committees.
- 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.
- Lived experience of our services or of being from a marginalised community

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



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

You will also join a trustee board committee, matching your skills, experience or areas of interest, which meet three or four times a year.

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 travel as required for 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 attendance is possible for some meetings.



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. If you have any further questions about the role, please email citizensadvice@starfishsearch.com. To make an application, please go to <https://starfishsearch.com/jobs/ca-trustees/> 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 **Monday 18th March 2024**

Selection Timetable

Closing date	18th March 2024
First stage discussions	w/c 25th March and 1st April 2024 (with spillover into w/c 8th April 2024)
Final interviews	Following agreement of the shortlist, likely w/c 29th April 2024

