

Trustee

citizens
advice

Thanks for your interest in being a trustee at Citizens Advice. This document should give you everything you need to know about this role.

Want to chat about this role?

Please contact the Recruitment team at careers@citizensadvice.org.uk

Welcome

Dear Applicant,

As the national organisation supporting a network of independent local charities, Citizens Advice is united by a shared mission to create a society where people face fewer problems. We're driven by a commitment to help individuals resolve their issues, but also to address the root causes of those problems by working with governments and other organisations. We aim to make a positive impact on society both individually and collectively. Our work provides advice on a wide range of issues, giving us unique insight into the challenges people face today. We influence businesses, policymakers, and government, driving changes that benefit people now and in the future. The ideal candidate will be a trusted advisor with sound judgement, strong interpersonal skills, and emotional intelligence.

We are looking to appoint an experienced legal professional to join our Board of Trustees, and support our purpose as a charity. This experience could be from any sector and in a legal department, practice, consultancy or law centre; what is most critical is a fresh perspective and dedication to our mission. We welcome individuals who may not have prior experience as a trustee but are keen and motivated to contribute to our important work. It would be ideal for candidates to also have lived experience of the Citizens Advice service and/or lived experience from a personal or work perspective of specific intersectional challenges certain marginalised communities face.

The trustee role involves ensuring Citizens Advice delivers on its purpose and missions. Trustees should drive positive change, develop productive relationships with the executive team; equally supporting and holding to account for organisation performance and ultimately helping to navigate the challenges and opportunities ahead with focus and clarity. This requires some key skills and capabilities: strategic thinking, sound judgement, strong interpersonal skills, and emotional intelligence.

Equity, Diversity, and Inclusion (EDI) are core to our strategy and service. We are committed to creating a diverse and inclusive workplace where everyone feels valued and respected. We encourage applications from people with diverse backgrounds, including those who are disabled, have caring responsibilities, or are people of colour.

If you believe you have the experience and qualities we are looking for, we would be delighted to hear from you.



Matthew Swindells
Chair

About us

We are a charity working for the whole of society - whoever you are, whatever your problem.

We help millions of people every year with free, independent and expert advice across the broadest range of areas - from money and debt, to benefits, housing, energy, work and so much more.

This gives us a unique and unmatched understanding of the issues that are affecting people in our society. And this insight is valued by businesses, other charities and the government.

We're a voice for the people we help. Using real time data from millions of our clients we can advocate for changes to the government policies and industry practices that we know make life hard for people. We can identify emerging issues, understand what is causing them and make recommendations to policymakers on how to fix the problem.

That's why we are The People's Champion.

But we can't do this alone. Times are tough for everyone and more people than ever desperately need our help but our services are stretched to the limit.

In 2022-2023 we helped **2.66 million** people one-to-one, by phone, email, webchat or in person.

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.

To be there for everyone that needs us it's vital that we can rely on financial support, from generous individuals to corporate partners. As a charity, fundraising is our life blood.

We've been giving expert information and advice for 85 years and will continue to be there for the whole of society - whoever you are, whatever your problem.



We are **citizens advice** The people's champion.

Our strategic direction

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. Against that background, while our service is never more needed, it is never more difficult to make the difference. When people are living on empty, sadly, our advice isn't always enough.

Combined with the financial pressures that we face, this means that in spite of our best efforts, we are not able to meet the increasing demand for advice. We are not reaching as many of the people who face barriers and inequities in society as we should. We've been around a long time and we're no strangers to challenging times. Throughout the history of Citizens Advice we've adapted to changes in the lives of the people we support, changes in the advice they need and how we provide it. Faced with current realities we need to adapt again. In doing so, though, we mustn't lose sight of what makes Citizens Advice unique, our advice so effective and our impact so great.

We have defined three missions, long term challenges that we are using to align the work we do and to experiment and learn to give more advice to more people, to reduce gaps in access and experience among our most marginalised clients and to help prevent problems from reaching crisis point.

Moving to mission-based working is a practical response to the need to focus our efforts on where we can have the greatest impact, and an expression of how we can harness the power of being one service with many leaders. By working across teams, forging new relationships across national and local boundaries, and with partners in other organisations, we aim to realise three fundamental missions. This new approach will capitalise on the ideas and energy of our local offices, by scaling up initiatives that work and providing a framework for working together, experimenting, and innovating.

Our strategy reaffirms the importance of financial sustainability across our service, including our drive to find new sources of income and the need to focus resources behind our missions. Guided by our fundamentals, this will mean thinking carefully about the needs of the future and shaping our service to respond to these, recognising the potential of new models and digital to shape our advice, our engagement with people who need us, and our service as a whole.

“

I was nearly in tears when I first spoke with Citizens Advice. But they've been over-the-top supportive. I would have crumbled without them.

- Client

”

Organisational context

Citizens Advice is undergoing a period of significant transformation, moving to an ever more integrated approach to digitally enabled service delivery across the network of Citizens Advice organisations.

We are transforming to ensure we deliver modern services in a digital age which provide positive client experience across all channels; developing the conditions for success across all organisational domains, from capabilities, to design, culture and ways of working.

The new mission based strategy and recent work on refreshing our Local Support Offer (to the network of 240 local Citizens Advice Charities), has significant implications for how we work moving forward.

This will involve promoting effective collaboration, providing the freedom that a complex and adaptive service requires and delivering in line with our means. It is underpinned by a commitment to developing a dynamic 'one system, many leaders' operating model which better enables devolution of choice and influence across the network, and which is enabled by shared principles, common capabilities and cultural ways of working where important.

Generally, the organisation is adopting a more adaptive approach to working, learning from doing, responsive to feedback, changing needs and available funding - a living strategy.

85
Years of

**citizens
advice**



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 colleagues.

We know that marginalised communities face greater difficulty accessing our advice and they sometimes have a poorer experience when they do. Given the pressures on our service, we need to work hard to ensure that we really are reaching those who need us most, and putting a real focus on people and communities we want to do better for.

Our data is clear that a higher proportion of white people using our services said we were easy to access compared to people of colour and that white people are more likely to view Citizens Advice positively. This isn't good enough and we want to make sure we provide an inclusive, accessible experience for everyone. We also know that there are lots of people we are not yet reaching or are not yet accessing our services, including disabled people.

In our work we prioritise the needs of marginalised people and actively challenge disparities and inequalities both in how we provide our services, but also in how we advocate for change. We are building on recent work supporting more inclusive access for people of colour and disabled people, as well as centring lived experience in the work we do.

We also continually review data and insights to keep our focus on new and emerging issues as well as entrenched ones, such as how we might better support young people.

We are aware that equality disparities lead many clients to seek our service and an equitable and inclusive workforce is key to ensuring we provide an effective service. This is why [EDI is of strategic importance](#) within the organisation and recognised as integral to all we do as a service.

Find out more

- [Meet our Trustees](#)
- [Our impact report](#)
- [Our annual report](#)
- [LinkedIn](#)
- [Citizens Advice public-facing website](#)
- [Find out more through blogs, insights and 'how we help' stories](#)
- [When we say we're here for everyone we mean it](#)
- [Lessons we learnt when starting a TikTok channel](#)
- [How our data provides a unique, frontline insight into the cost-of-living crisis](#)
- [Why Citizens Advice is a great place to work](#)

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

Developing and maintaining vision, strategy and clear objectives for Citizens Advice in the long-term best interests of the service's clients.

Legal obligations

Ensuring that the charity complies with its charitable objects at all times, and with the law more generally.

Ensuring Accountability

Being open to challenge and questioning from the Network, listening and consulting with the Network and explaining decisions clearly.

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.

Employment

Appointment, appraisal and dismissal of the Trustees and the Chief Executive.

Reporting and Monitoring

Overseeing performance management and holding the Executive Team accountable, as well as working closely with them as they progress the strategy.

Who we are looking for

Your knowledge and experience

- [Essential] A professional Law qualification in an area relevant to our purpose.
- A strong understanding of the role Citizens Advice plays locally and nationally and the key drivers of why clients seek our help.
- Experience of strategy development and performance and impact monitoring.
- Experience of working in or with diverse communities.
- Ability to apply experience between sectors - e.g. from comparably complex non-charity contexts into a charity environment.
- Awareness of big charity governance.
- Knowledge/experience of risk assurance.

Your skills, abilities and personal qualities

- Able to bring a legal perspective to the thinking of the Board - this is about bringing thinking as opposed to being the legal adviser to the Board.
- A strong empathy and understanding of Citizens Advice and a connection to our mission and vision and client need.
- Strong team, interpersonal and The ability to drive forward a culture of collaboration skills.
- Integrity, authenticity and the ability to act impartially and fairly at all times.
- A collaborative listener.
- Empathetic, passionate and ambitious.

To ensure more diversity at board level we strongly encourage applications from under-represented communities.

Currently we are particularly seeking to increase the involvement of people of colour and people with a disability on our Board.

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.

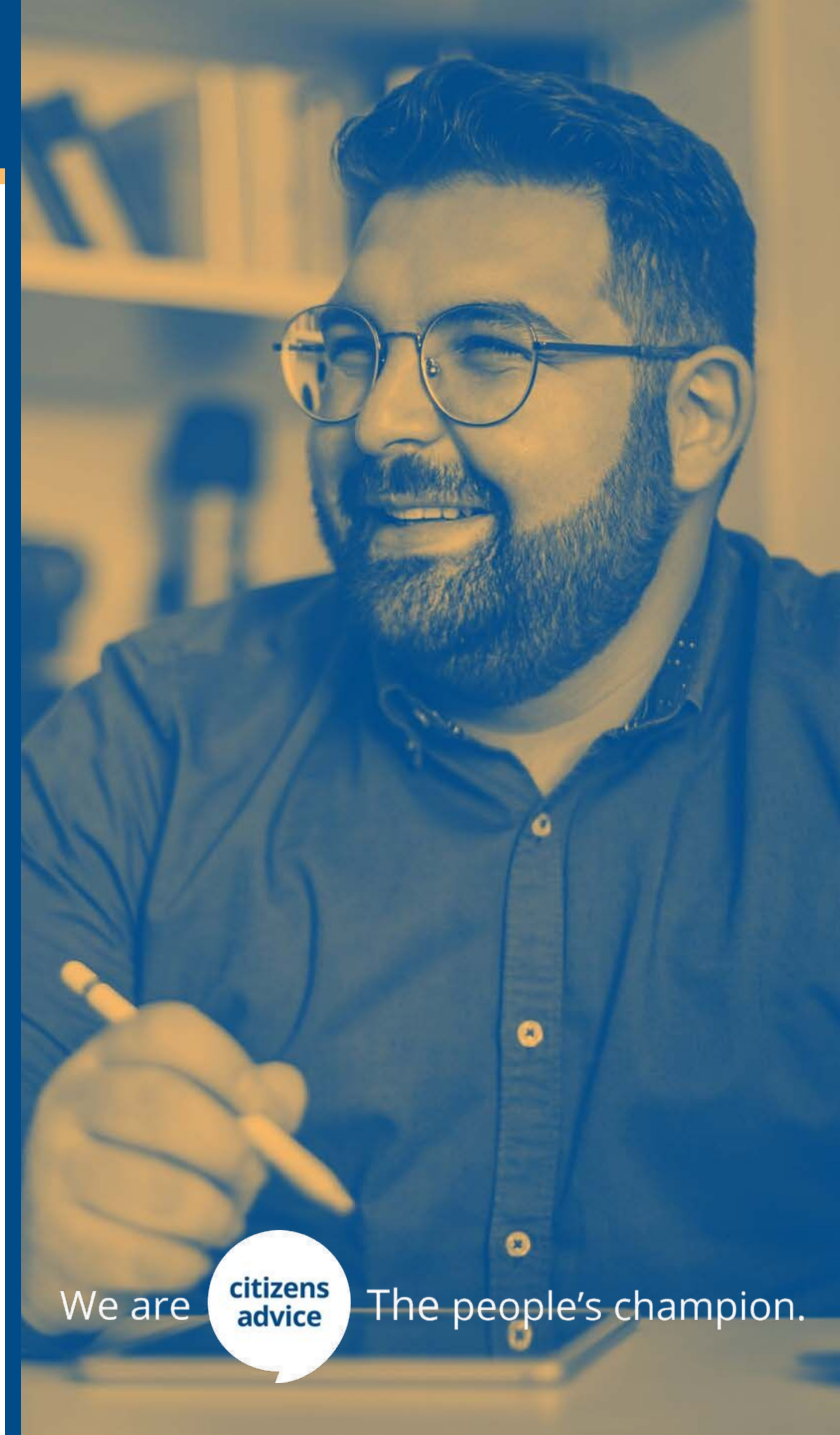
There are four trustee board meetings each year, plus two strategy days and one annual general meeting (AGM).

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.



We are  The people's champion.

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 apply, please provide:

- 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 complete the 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 **12 January 2025**.

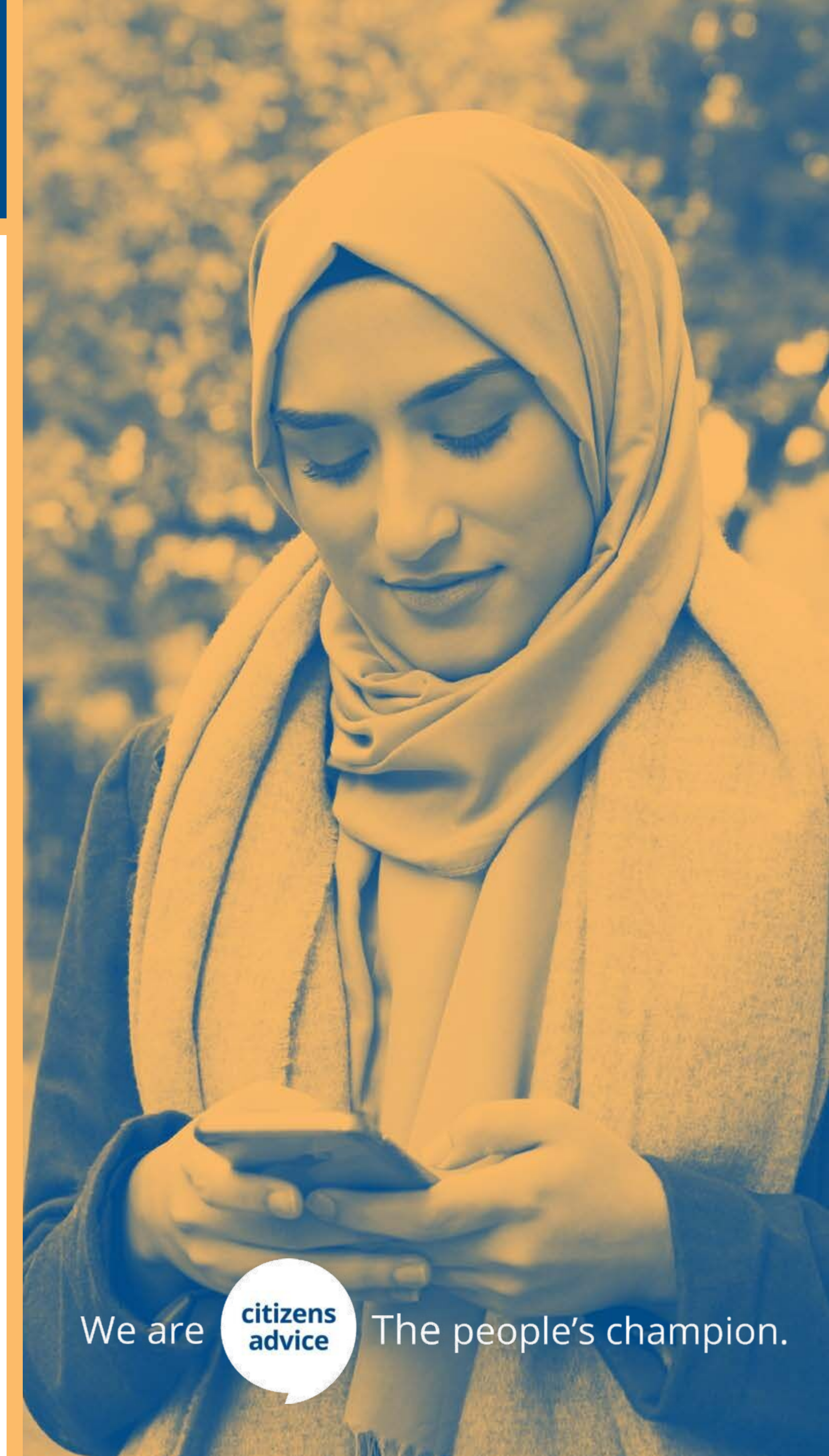
Selection timetable:


Closing date:

12 January 2025

Interviews:

w/c 27 January 2025 and w/c 3 February 2025



We are  The people's champion.