

Ever thought about being a Trustee?



**citizens
advice**

**Bath &
North East
Somerset**

Message from the Chair

Dan Lyons

Dear Potential Trustee,

Thank you for your interest in becoming a Trustee on the Board of Citizens Advice Bath and NE Somerset. It is an opportunity to be a leading part of a charity which helps some of the least well-off people in our community. This pack will give you everything you need to know to apply for this role and what it means to be a trustee.

As Chair of the Trustee Board at Citizens Advice Bath & North East Somerset, I am delighted to extend a warm invitation to you to join our dedicated team. Volunteering with us offers a unique opportunity to make a meaningful difference in our community by providing vital support and guidance to those most in need.

At Citizens Advice, we are committed to empowering individuals, tackling inequality, and driving positive change. By becoming a Trustee, you will play a crucial role in shaping our strategic direction, ensuring that our services remain responsive and effective in meeting the evolving needs of our community.

Volunteering with Citizens Advice B&NES is not just about giving back; it's about actively contributing to the betterment of our society. If you are passionate about making a real difference and are ready to be

part of a dedicated and compassionate team, we encourage you to join us on this rewarding journey.

We look forward to welcoming you aboard and working together to create positive outcomes for individuals and families across Bath & North East Somerset.

Warm regards,

Dan Lyons

Chair of Citizens Advice Bath and NE Somerset





About Citizens Advice Bath and NE Somerset



Citizens Advice Bath & North East Somerset is a **registered Charity and a Company Limited by Guarantee**. Members of the Board are both Charity Trustees and Company Directors.



We give **independent, impartial, free and confidential information and advice whoever you are, whatever the problem**. We value diversity, champion equality, and challenge discrimination and harassment.



As well as giving advice **we aim to prevent the problems that affect people's lives** – we collect evidence of practices and policies that cause the issues we help with; our knowledge of clients' problems and circumstances enable us to campaign for change to get a fairer deal for everyone.



At Citizens Advice Bath & North East Somerset we also have **specialist services** such as debt advice, welfare benefits tribunal representation and employment casework.

At Citizens Advice Bath and NE Somerset we have **around 100 trained volunteers and 28 paid staff** that we use to deliver most of our advice services and for a variety of support roles.

2023-24 key statistics



6,074 people helped



Advised on 18,598 issues



Top 3 advice areas: benefits, debt, utilities and energy



61% clients were disabled/had a long term health condition



11% of clients had an ethnic minority background and 9% were white other



£6.78 million financial gains for the local community



29% of clients lived in 6 council wards

If you would like to have an informal conversation with our CEO before applying, please email simon.lawson@cab-banes.org to arrange a conversation by phone, or video call.

The role of a Trustee



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 and attend four board meetings per year
- work on specific projects with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice
- take an active role in discussions during board meetings and work with other trustees to:
 - set policy and strategy direction, set targets and evaluate the performance of the local Citizens Advice
 - monitor the financial position of the local Citizens Advice 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



What's in it for you?

- **Satisfaction of making a positive impact for the community** - as a trustee, you would be helping to deliver a vital local service that helps thousands of people every year to find a way forward
- **Expenses** - all trustees are volunteers, which means they aren't paid. However, we do pay out of pocket expenses, such as travel to-and-from meetings.
- **Training** - all trustees are given training and can attend events so that you know what is expected of you & how to carry out your role.
- **Experience** - being a trustee is a good experience to put on your CV for increasing employability. It shows that you can hold a position of responsibility, work with others and help to lead and guide an organisation also build on your governance, leadership and strategy skills



What do you need to have?

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

- Understand and accept the responsibilities & 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 judgment
- Have good numeracy skills to understand accounts
- 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



You may need to attend other meetings with some staff and volunteers, depending on what lead role you take responsibility for. We can be flexible about the time spent and how often you volunteer so come and talk to us.



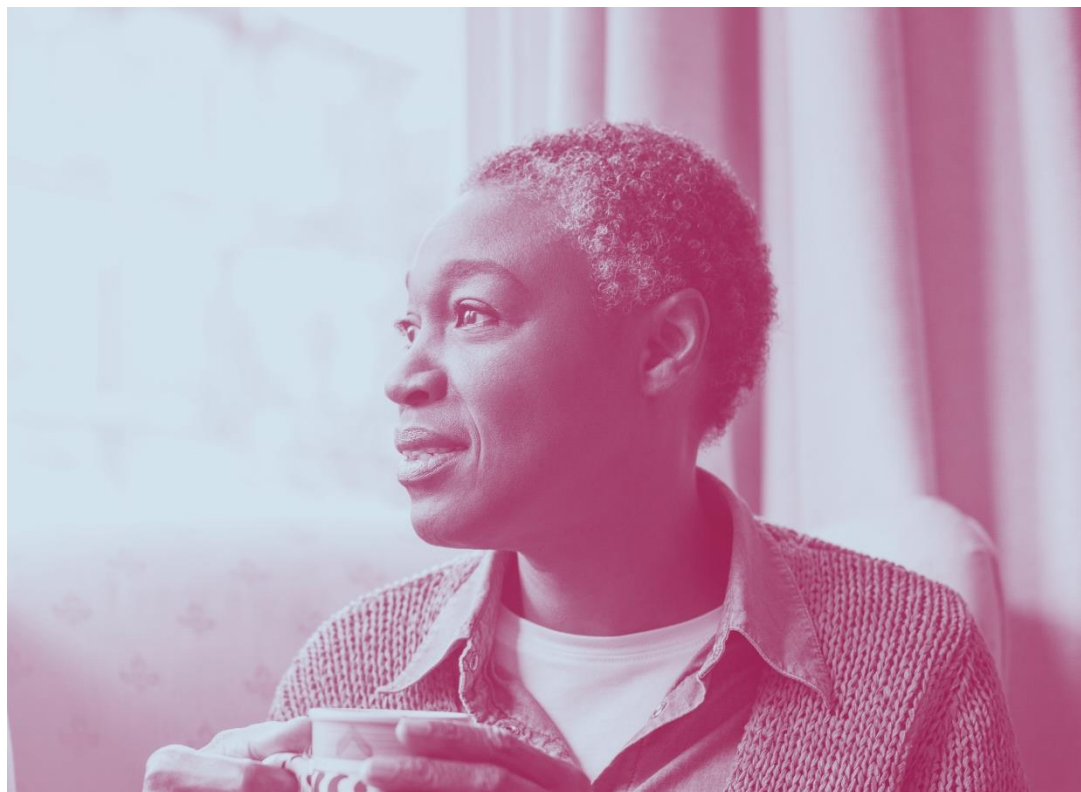
Valuing inclusion

Our volunteers come from a range of 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 flexibility around location, time, 'what you will do' and how we can support you please contact us.

How much time do you need to give?

Trustee boards usually meet during the day, and we prefer that trustees attend in person, but there is a video link if this isn't possible. Meetings are held in March, June, September and December in Bath and usually last up to three hours.





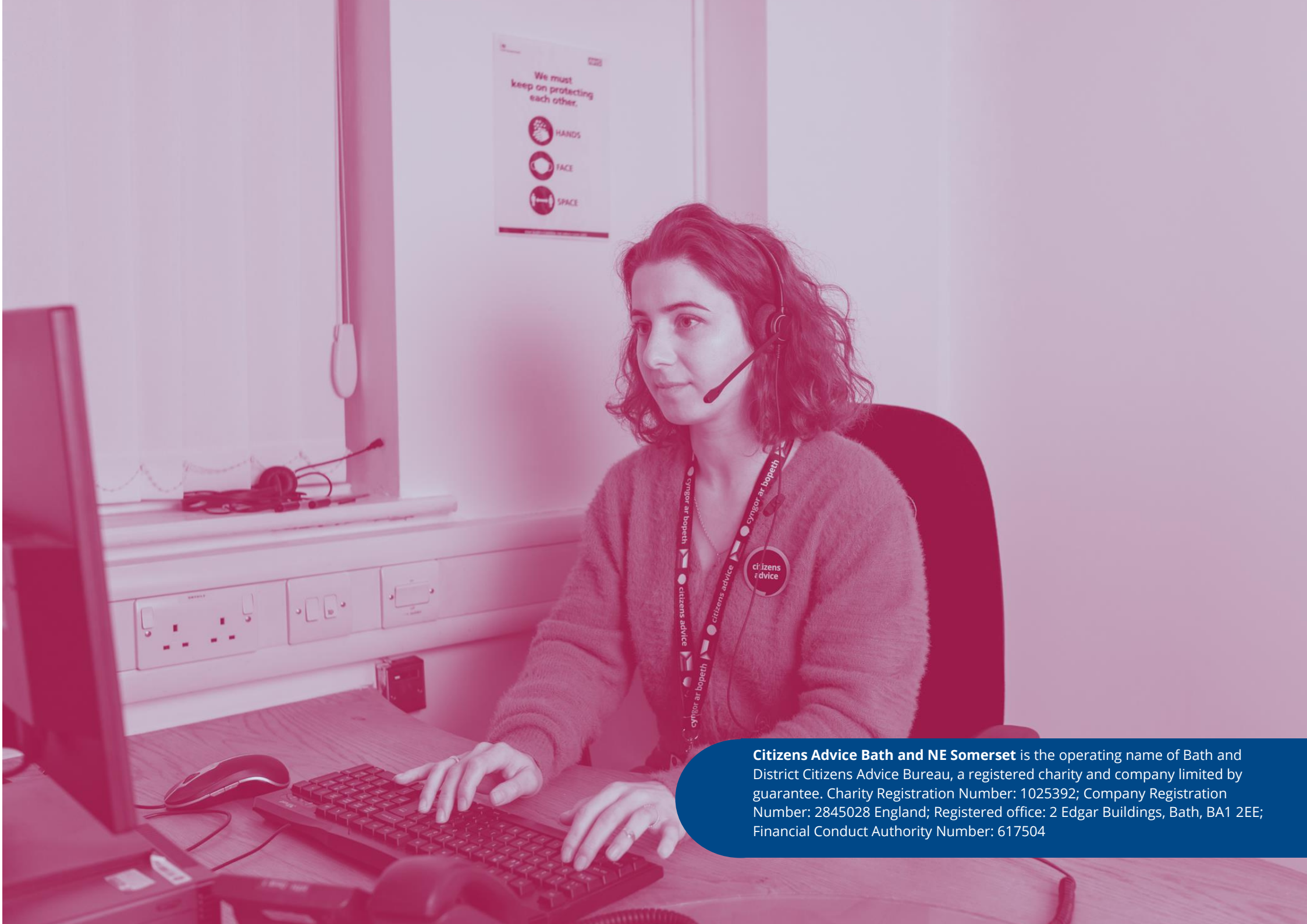
How to apply:

Please complete this form on our website: [Volunteer with us](#) and we'll send you a full application form. Once we've received your completed application form, we will invite you to informal meetings with our CEO and chair, then a more formal meeting with two of our trustees.

Closing date for applications is Monday 9th of September 2024. Informal meetings and interviews will take place during the weeks of 16 and 23 September.

If you would like to have an informal conversation with our CEO before applying, please email simon.lawson@cab-banes.org to arrange a conversation by phone, or video call.

"I really enjoy using my skills and knowledge to help this charity meet the needs of our community. That's really important to me."



Citizens Advice Bath and NE Somerset is the operating name of Bath and District Citizens Advice Bureau, a registered charity and company limited by guarantee. Charity Registration Number: 1025392; Company Registration Number: 2845028 England; Registered office: 2 Edgar Buildings, Bath, BA1 2EE; Financial Conduct Authority Number: 617504