



Trustee

Role Profile

Thank you for your interest in working at Citizens Advice North Somerset (CANS). This Role Profile should give you everything you need to know to apply for this role and what it means to work at Citizens Advice North Somerset.

In this pack you'll find:

- Our vision, aims and values
- Overview of the Citizens Advice service
- Overview of Citizens Advice North Somerset
- Role Profile



Our vision, aims and values

Our Vision

“To improve the wellbeing and health of everyone living and working in North Somerset and the wider area, who needs our help and support, by providing accessible, effective and tailored information and advice that is free, independent, confidential and impartial”.

Our Aims

Citizens Advice North Somerset shares the over-arching aims, values and principles of Citizens Advice to:

- Provide the advice people need for the problems they face
- Improve the policies and practices that improve peoples' lives

At the centre of all of Citizens Advice North Somerset's strategies are our 5 ambitions:

1. To be more **accessible** across multiple channels
2. To have more **influence** within our communities
3. To be sustainable and **effective**
4. To continue to invest in our **people**
5. To be a strong **Equality Champion**

Our Principles and Values

As a member of the Citizens Advice service, Citizens Advice North Somerset provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities.

We believe that our common humanity makes us equal in worth, dignity and rights. We value diversity, promote equality and challenge discrimination.

Our service is available to everyone living, working or travelling through North Somerset and the wider area, regardless of race or nationality, gender, disability, sexual orientation, religion, age or marital status. We want to make sure everyone has access to our services. We are constantly reviewing how we can improve what we do and how we can do it, to reach all those people who need our help.



Overview of Citizens Advice service

- 1. We're local and we're national.** We have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services across England and Wales.
- 2. We're here for everyone.** Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.
- 3. We're listened to – and we make a difference.** Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

The Citizens Advice service is made up of Citizens Advice – the national charity – and a network of around 300 local Citizen Advice members. Each Local Citizens Advice (LCA) is an independent charity. As the Citizens Advice network, we collectively deliver services from over:

- 600 local Citizens Advice offices and locations
- 1,800 community centres, GP surgeries and prisons

We do this with over:

- 6,500 local paid staff
- 23,000 trained volunteers

Our community reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 Minute drive of where they live.



Citizens Advice North Somerset

Citizens Advice North Somerset is a member of the Citizens Advice network and an established and well regarded local independent charity who provide free, impartial and confidential advice. We undertake research & campaign work to influence policy makers and to effect change. We work in partnership with the Local Authority, The Legal Aid Agency, Macmillan Cancer Support, The Money and Pension Service (MaPS), Wessex Water BNSSG CCG, Pier Health PCN and many local and national partners to deliver our services to over 8,000 clients each year. We deliver in-reach services in GP

surgeries (social prescribing), Weston General Hospital and Weston County Court, and working in partnership with our Town and Parish Councils and local community groups, we are reintroducing our out-reach services at locations across North Somerset.

Trustee Role Profile

Role:	Trustee
Team:	Board of Trustees
Responsible to:	Chair of Trustees
Location:	Head office in Weston-super-Mare/home working and various locations within North Somerset

Role purpose:

- The Board of Trustees is responsible for the overall governance and strategic direction of Citizens Advice North Somerset (CANS).
- Trustees ensure the organisation meets the Citizens Advice membership requirements.
- To work in partnership with other Trustees and the Chief Officer to ensure the effective and efficient development, management and administration of CANS.
- To ensure CANS is reaching the advice needs of the community within the areas of benefit laid down in the charity's constitution and continues to demonstrate public benefit.

The Board of Trustees is collectively responsible for the governance of the organisation, including setting an overall vision. This can broadly be defined as:

- Holding staff accountable, and being ultimately accountable for the activities of the organisation
- Providing leadership to all in the organisation
- Developing policy
- Strategic management

Each individual member of the Trustee Board has a responsibility to contribute to the discharging of the Board's duties, service delivery, planning and development.

Each Trustee is accountable for all the decisions taken by the Trustee Board, including those taken if they are absent. Once the Trustee Board has reached a decision, all individual members of the Board are bound by it and must support it. No one Trustee or group of Trustees (eg a Committee) has the authority to take decisions or decide

policy unless the Board has clearly delegated authority to them. The Board should not rely on the advice of an individual Trustee, as decisions are the collective responsibility of the whole Board.

The main duties of a Trustee include:

- To ensure CANS complies with its governing documents, charity and company law, Citizens Advice LSA standards, FCA standards and any other relevant legislation or regulations.
- To actively contribute to setting policy and strategic direction, defining goals, setting targets and reviewing and evaluating performance.
- To contribute to the sound financial management of CANS through regular monitoring of the financial position, including approving annual budgets, and monitoring progress against them, and approving the annual report and accounts.
- To take reasonable care in the protection and management of the assets of the charity, and ensuring the proper investment of CANS' funds in line with the objects of the charity.
- To act in the best interests of CANS at all times; safeguarding the good name and values of the charity.
- To prepare for and attend Board and Committee meetings as appropriate, providing advice and guidance in areas in which the Trustee has special expertise.
- To participate in other tasks and projects as they arise, such as HR procedures, funding opportunities and assisting with fundraising and promotional activities.
- To keep up-to-date with the activities of CANS and the wider issues which affect its work.
- To represent CANS at external meetings and events as appropriate.
- To hold responsibilities under CANS' Business Continuity Plan.

Person specification:

- A commitment to CANS and its objectives, and a willingness and ability to act in the best interests of the charity.
- An understanding and acceptance of the legal duties, responsibilities and liabilities of trusteeship.
- A willingness to devote the necessary time and effort to Trustee duties.
- Strategic vision and the ability to think creatively and exercise independent judgement.
- Good communication and inter-personal skills.
- An understanding of financial management of a charity.
- The ability to work effectively as a member of a team.
- A willingness and ability to learn.

Terms of appointment:

- Trustee appointments will be made and reviewed in line with the Articles of Association and Standing Orders (2022).

- CANS is committed to supporting its Trustees, and provides a thorough induction to the charity and the role. Trustees are expected to attend training events relevant to the role as necessary.
- The position of Trustee is unpaid, although reasonable expenses are payable in line with CANS' Business Expenses Policy.
- Trustees must declare any conflict of personal or pecuniary interest whilst carrying out their duties.
- Trustees are expected to maintain confidentiality about any sensitive or confidential data received in the course of their duties.

Eligibility: some people are disqualified by law from acting as a Trustee, including:

- A director must be a natural person aged 16 years or older.
- No one may be appointed a director if he or she would be disqualified from acting under the provisions of article 39.
- No paid worker, employee or unpaid volunteer of the charity may be a director.
- A director must also be a member (or duly appointed representative of a member organisation) of the charity.
- Anyone who has an unspent conviction for an offence involving deception or dishonesty.
- Anyone who is an undischarged bankrupt.
- Anyone who has been removed from trusteeship of a charity by the Court or the commission for misconduct or mismanagement.
- Anyone under a disqualification order under the Company Directors Disqualification Act 1986.
- Anyone who has entered into a composition or arrangement with their creditors which includes an individual voluntary arrangement (IVA), and is currently on the Insolvency Service Register.