

# Trustee Recruitment Pack

## Who We Are

Cambridge and District Citizens Advice is a registered charity that provides free, confidential, impartial advice and support to anyone on any problems they face in their lives.

We offer help in relation to a wide range of social welfare areas. We help clients enforce their employment rights, manage their money, improve their housing, and access their benefit entitlements. We promote consumer rights, such as protecting people from scams and rogue traders.

We are part of a network of around 300 other local Citizens Advice Offices. Each one is a separate independent charity, but we are all regulated by, and members of, National Citizens Advice who audit the quality of our work regularly.

Our work is also regulated by the Financial Conduct Authority and our Money Advisers are all members of the Institute of Money Advisers

## Our Mission Statement

The Citizens Advice service provides free, independent confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

The Citizens Advice Service aims

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives
- To be proactive where possible and reactive when necessary

## Our Values

We are

Purpose driven - We always focus on the people who need our help

People focused - We recognise, value and reward everyone's contributions and talents in an open, fair and meaningful way

Collaborative - We build relationships across teams and locations to foster innovation and inclusive ways of working

Transparent - We're open and honest, sharing information early and often whenever we can

## What are we looking for?

A number of long-standing trustees have reached the end of their term of office, and we are looking for a up to 3 new trustees to join our Trustee Board.

We are looking for people with a range of skills who share our values and are committed to delivering our mission, including those who may have personal experience of utilising our service.

To complement the skills and experience of the current Board we particularly would also welcome Trustees who have:

- a background in PR, marketing and communications (including digital)
- a background in fundraising (preferably charity)

But the list above is not exclusive, and we welcome applications from anyone who feels they could bring something to the charity.

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.

You also do not have to have prior experience of being a charity Trustee, as we will support you with training.

## What would you get out of the role?

The opportunity to be part of an important local charity that makes a difference to people's lives, working alongside a committed Board and staff and volunteer team.

At a time when the cost-of-living crisis is impacting on more and more people, being a trustee of Cambridge and District Citizens Advice is a tangible way you can put

something back into the local community and to help ensure people get the advice and support they need.

Being a charity Trustee gives you an opportunity to share your personal and professional skills and expertise for the benefit of the charity. For those who are building their professional careers it can also be a good development opportunity, giving you the opportunity to work as part of a Board and be engaged in wider strategic decisions than you may have experienced previously.

## What is a Charity Trustee?

All registered charities in England and Wales are regulated by the Charity Commission, which is responsible for ensuring that charities adhere to the law and follow best practice. The commission also provide guidance and support for charities and those involved with them. This guidance includes [‘The Essential Trustee Guide CC3’](#). This states that:

*“A trustee is a person who serves on the governing body of a voluntary or community organisation. They may be known as a trustee, a director, a board member or a governor. Trustees have ultimate responsibility and legal obligation for directing the affairs of the organisation and ensuring it is solvent, well-run and delivering the outcomes for which it has been set up.”*

## Cambridge and District Citizens Advice Trustees

As a member of the Cambridge and District Trustee Board, you will be both a charity trustee and a director of a company limited by guarantee.

As a trustee you must ensure that the charity complies with its governing document, charity law and other legal obligations i.e., employment law, and health and safety law. You must also ensure that Cambridge and District Citizens Advice applies its resources exclusively in pursuit of its charitable intentions.

You and your fellow trustees, not the staff, are ultimately responsible for everything the charity does, whether you attend meetings and vote for decisions or not. You must set aside any personal interests to act only in the best interests of Cambridge and District Citizens Advice and its beneficiaries.

As a trustee of Cambridge and District Citizens Advice you are also a company director and along with the other trustees you are responsible for the management of the

company. You are collectively responsible for ensuring that company does everything that it is required to by law and that the decisions that are taken are in the best interest of company and its members and beneficiaries.

Please Note: You are disqualified from acting as a director if you are currently disqualified or if you are an undischarged bankrupt

You are disqualified from being a charity trustee if you have an unspent conviction for an offence involving dishonesty or deception; for specified terrorism offences; for a specified money laundering offence; for specified bribery offences; for the offence of contravening a Charity Commission Order or Direction; for offences of misconduct in public office, perjury, or perverting the course of justice; and for aiding attempting or abetting the above offences.

Acting as a trustee when disqualified is a criminal offence.

## Fit and Proper Person Declaration

HMRC expects that Trustees who exert control over spending the charity's funds, or who act to claim tax relief on behalf of the charity, will be 'fit and proper persons' for their role. This can apply to Trustees and to key employees who hold such roles.

Full details of the 'fit and proper persons' test, including how HMRC would act on any information received, and how they would treat personal information, may be found online: <https://www.gov.uk/government/publications/charities-fit-and-proper-persons-test>

## Cambridge Trustee Role Profile

Each individual member of the trustee board has a responsibility to contribute to the discharging of the board's duties. They do this by:

- maintaining an awareness of the business of the organisation
- taking responsibility for their own learning and development
- regularly attending, preparing for and taking a full part in meetings
- actively contributing to setting policy and strategic direction, defining goals, setting targets and evaluating performance

- monitoring whether the service complies with its governing document, whether it meets Citizens Advice standards and how well the advice needs of the local community are being met
- monitoring the financial position and ensuring that the organisation operates within its means and objects, and that there are clear lines of accountability for day-to-day financial management
- supporting the development of the organisation through participation in agreed projects
- actively seeking to further the strategic objectives of the organisation, and acting in its best interests at all times
- Maintaining confidentiality about any sensitive or confidential information received in the course of duties as a trustee.

## Personal skills and qualities for all Trustees

Each individual member of the trustee board brings skills and qualities to the board. They add to the collective knowledge and experience by providing:

- commitment and availability to attend meetings
- effective communication skills and willingness to participate actively in discussion
- willingness to gain knowledge of local needs and resources
- commitment to the aims, principles, and policies of the Citizens Advice service, including those relating to equal opportunities, independence, and research and campaigns
- willingness and ability to act in the best interests of the organisation
- ability to understand and accept their responsibilities and liabilities as trustees and employers
- willingness to participate in democratic process which develops Citizens Advice policies by area and nationally
- numeracy to the extent required to understand accounts with the support of a treasurer
- willingness and ability to learn, and to develop and examine their own attitudes
- ability to think creatively and strategically, and exercise good, independent judgement
- ability to work effectively as a member of a team.

## Trustee Term of Office

The appointment as Trustee would be for a term of three years, with the possibility to serve a maximum of 3 three-year terms, subject to Board approval.

## Time requirement for all Trustees

All trustees would be expected to

- attend 5 Board meetings including the AGM and one strategy day each year
- be a member of at least one other Committee or working group meeting 2 to 4 times per year
- be a lead trustee for an agreed thematic area of the Citizens Advice's work (e.g. health and safety, equal opportunities; research) and act as a sounding board for Citizens Advice staff on that theme which may require additional meetings.
- In total, this should not exceed more than 8 days per year.
- To contribute to occasional ad hoc projects
- To attend occasional staff events

## How to Apply

Send us your CV and a covering letter explaining why you want to be a Trustee of Cambridge and District Citizens Advice and what you believe you would bring to the charity.

Email the CV and covering letter to [volunteer@cambridgecab.org.uk](mailto:volunteer@cambridgecab.org.uk)

We will then arrange interviews with shortlisted candidates.

If you would like to have an informal conversation with one of the Trustees, please contact:

[heatherdq@cambridgecab.org.uk](mailto:heatherdq@cambridgecab.org.uk)

[mariec@cambridgecab.org.uk](mailto:mariec@cambridgecab.org.uk)