



Taunton

CHAIR OF TRUSTEES INFORMATION PACK 2021



Citizens Advice Taunton is an operating name of Taunton & District Citizens Advice Bureau
Charity registration number 1050297
Company limited by guarantee. Registered number 2900368 England.
Authorised and regulated by the Financial Conduct Authority FRN: 617766.
Registered office: St Mary's House, Magdalene Street, Taunton, TA1



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Welcome from the Chair of Trustees

Dear Applicant,

I hope that when you have read this information pack you will feel inspired to join our Board of Trustees. I am due to retire at the 2021 AGM in September and we are looking to appoint a new Chair to join our Board. We are looking for someone who will have attained senior managerial/chief executive level during their career and be comfortable and knowledgeable in running Trustee Board Meetings.

It would be desirable, but not essential, that you have some experience in the charitable sector, although this certainly does not preclude anyone who has successfully made a career in the public or commercial sectors at a senior level.

We would welcome an application from you if you:

- have a desire to contribute to this outstanding charity;
- have the relevant experience;
- appreciate the commitment and role of a Trustee;
- are a strategic thinker, with the ability to identify opportunities and risks;
- have good communication skills and are able to make representations on behalf of CA Taunton at a very senior level;
- would enjoy working as part of a collegiate and friendly Board of Trustees.

We look forward to hearing from you.

With best wishes,

Julian Kupfer
Chair of Trustees

About Citizens Advice Taunton

Citizens Advice Taunton (“CAT”), established in 1954, supports people in Taunton and the surrounding district and we are seeking to appoint a successor to Julian Kupfer, our current Chair, who has successfully led the Board for the last five years.

Collaborative working between the four other Somerset offices of Citizens Advice and outside organisations, especially in the voluntary sector, has been key to our success and we would expect an incoming Chair to build upon this to help ‘future-proof’ Citizens Advice services, which are free at the point of delivery.

Citizens Advice is a brand that carries an enormous amount of respect and, more importantly, influence. The quality and quantity of data we collect, and campaigns we run, are used by both national and local government to guide their agenda/policy setting. Citizens Advice is acknowledged as being apolitical and is recognised by over 97% of those polled as being a trustworthy organisation, there simply to help the community and we are members of the Taunton Chamber of Commerce.

The role we are seeking to fill is both influential and prestigious, as CAT brings huge benefits to the local economy. In 2019/2020 we helped almost 8,000 people dealing with 23,800 issues and provided benefits of £20.5 million in social benefits and the wider economy.

Following Covid restrictions, St. Mary’s office reopened for face-to-face meetings on 18th May 2021, as we recognise their importance for those who have neither telephone nor internet access.

Our Aims and Objectives

Our core aim is to maintain a Citizens Advice service that is both relevant and accessible to the people of Taunton and the surrounding district. This means making sure they continue to have access to advice and information that is:

- of high quality and independently assessed;
- available in ways and at times that suit people’s needs, including by telephone, digital and face-to-face channels.

Our key objectives for the next three years are to:

1. Work to achieve a sustainable future for the provision of Citizens Advice services throughout Taunton and the surrounding district.
2. Continue to develop our relationship with statutory organisations in Somerset, including local and district authorities, health authorities and other funders, and look for imaginative and innovative ways to support their people-focussed objectives.
3. Increase our collaborative working with key partners to achieve better outcomes and greater efficiencies in anticipation of the changes to local government within the county.

Chair of Trustees Role Description

Provide effective leadership for the Board, including to:

- plan Trustee Board meetings with the CEO, including the dates and the agenda;
- facilitate the Trustee Board meetings and AGM by leading the meeting, ensuring that agenda items are discussed, enabling all members to contribute their views and take part and seeking clarification where necessary;
- ensure that decisions and actions taken at Board meetings are assigned and actioned;
- ensure that the Board decisions are made within the remit of the Citizens Advice membership agreement, governing documents and policies;
- work with other Trustees and the CEO to recruit a Trustee Board with a diverse range of skills, experience and knowledge;
- review the Board's work and how effectively it operates, including action for improvement;
- be proactive in recruiting successors to key positions such as Chair, Treasurer, etc.
- read papers for Board meetings, and attend Board meetings except in exceptional circumstances;
- monitor attendance and commitment of all Trustees;
- ensure that all Trustees receive an induction and the ongoing training needed for them to fulfil their role.

Provide governance leadership for the organisation, including to:

- maintain an awareness of how Citizens Advice Taunton is operating;
- provide support and supervision for the CEO including an annual appraisal;
- work in support of the Treasurer to ensure proper management and control of Citizens Advice Taunton finances:
 - monitor the financial position, ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management;
- together with the CEO, represent Citizens Advice Taunton in relationships with funders or potential funders, at local events, in the community and with other local CAs;
- maintain a regular dialogue with other Somerset Citizens Advice Chairs;
- ensure the Board remains compliant with the requirements of its funders, regulators and the law;
- 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;
- work together with all Trustees and ensure that the Board is able to:
 - set policy and strategy direction, set targets and evaluate the performance of Citizens Advice Taunton;
- work on specific projects to further our strategic objectives.

Candidate Specification

Individuals are sought who have a strong empathy with our work. We are looking for:

- Suitable management experience
- Experience in chairing meetings
- Experience of building and sustaining relationships with key stakeholders and colleagues to achieve organisational objectives
- An ability to demonstrate sound judgement and effective decision making
- A track record of impartiality, fairness and the ability to respect confidentiality
- A commitment to promoting equality and diversity
- Commitment to the work of Citizens Advice Taunton and a willingness to devote the necessary time and effort required
- Preparedness to make recommendations to the Board, and a willingness to speak their mind
- An understanding of the role and responsibilities of a Trustee

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.

Other Information

Citizens Advice Taunton Trustees

- Julian Kupfer (Chair) Retiring
- Andrew Kingston-James (Vice Chair)
- Phil Barker (Treasurer)
- Nick Bevan
- Rob Cadwallader
- Julia Hill
- Andrew Plumbly
- Emma Rhodin

Term of Office

Trustees are appointed by the Board for a term of 3 years, but may be re-elected.

Time Commitment

This is a significant role in a complex organisation and the candidate should expect to be spending on average 7 hours a week on the role, with the inevitable variation depending on the calendar of events.

Meetings

The Board of Trustees meets five times a year at St. Mary's House, although throughout the Covid pandemic all meetings have been held online. Board meetings usually last about two hours.

Dates for 2021 Board Meetings:

- Wednesday 18th August
- Wednesday 1st September (AGM)
- Wednesday 17th November

Committees

There are three Committees (Finance, Operations, Governance & Strategy), which meet four times a year. These meetings are held online.

Weekly telephone conferences

Weekly telephone conferences lasting approximately 30 minutes are held at 5pm on Wednesdays. These are not regarded as obligatory but serve to keep Trustees current between meetings. They are led by the Chair with input from the CEO.

Expenses

The role is unpaid, but reasonable expenses are payable in line with the charity's standard expenses policy.

Recruitment Process

- Please send your CV and supporting statement to our recruitment partner, Jackie Dawkins of Shine Charity Recruitment (01884 841751; jackie@shinecharityrecruitment.co.uk)
- A meeting with Jackie, followed by
- A meeting with two Trustees
- An invitation to attend a Board Meeting as an observer
- References taken
- A formal invitation to join the Board
- Induction



Our values

We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.

We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.

3 things you should know about us

We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

1. We're local and we're national. We have 5 national administrative offices and offer direct support to people in over 270 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.

How Citizens Advice Taunton works

Citizens Advice Taunton delivers advice and support to nearly 8,000 people living and working in Taunton Deane and surrounding areas. We do this by providing the following services:



Generalist Advice Service – face-to-face, telephone and email advice delivered by our team of 60+ volunteer receptionists, advisers and administrators who are supported by paid Advice Supervisors. In 2019/20 our advice teams helped 7,932 clients with nearly 24,000 issues.



Somerset Adviceline – a telephone advice service delivered in partnership with all Somerset Citizens Advice offices. The service is staffed by volunteer and paid advisers.



Email advice – we deliver advice via our website email submission form. This The service is staffed by volunteer advisers and ensure that people who cannot call or visit receive the same quality advice service.



Outreach Services – face-to-face advice delivered by volunteer advisers. These services are delivered in Wellington, Priorswood and Halcon.



In-reach Service – face-to-face advice delivered by a paid specialist adviser to inpatients at Wellsprings Hospital and Wellesley Hospital.



Equality and Diversity – We apply core values of dignity, respect, equality and non-discrimination, based on our common humanity. We seek to foster empowerment and participation at all levels.



Research & Campaigns – we collect evidence of the issues facing our clients and we use this evidence to challenge unfairness and influence decision makers at local, regional and national level.



Dedicated Projects

We work in partnership with the Local Authority, Macmillan Cancer Support, Wessex Water, MS Society and many more local and national partners to deliver a number of additional paid staff projects, including:

One Teams Money Matters: our One Team Money Matters advisers provide debt advice to people living in a One Year area (Wellington, Halcon and Priorswood), or are referred to them by one team workers.

Macmillan Benefits Advice Service: provides benefit advice and Macmillan grant applications to people affected by cancer. The service is delivered by telephone, email, and face-to-face at our main office, the hospital, the Beacon Centre, St. Margaret's Hospice and at home visits.

Multiple Sclerosis Access-to-Advice: provides advice and information on any subject to people affected by MS in the Taunton Deane area. The service is delivered by telephone, email, and face-to-face at our main office or at home if the client is housebound.

Pension Wise: guidance appointments are available for people approaching retirement or aged 50 or over, have a defined contribution pension, and have not had a guidance appointment before. Appointments are delivered across Somerset and beyond.

Litigants in Person: funded by the Community Justice Fund, this project provides advice and assistance to survivors of Gender Violence and Abuse, to help them understand and complete the court processes required to arrange the protection they need from their perpetrator.

Open Mental Health: Working in partnership with an array of statutory and voluntary agencies to support people experiencing mental health difficulties to access to specialist mental health services, housing support, debt, benefit and employment advice.

Homelessness Reduction Act Debt: this is for clients approaching the local housing authority under the Homeless Reduction Act (which extended housing authority duties to people who were previously ineligible for their help), and is funded by them. Our role is to provide debt advice to those in potential housing need with the aim of averting homelessness.

Psychiatric in-reach advice: we provide an holistic advice service to in-patients at two local hospitals, helping them to prepare for their return to the community, or to manage their affairs during their treatment.

Money and Pensions Service capacity building project: this project was set up to increase the availability of debt advice following the upturn in financial hardship resulting from the Covid pandemic.

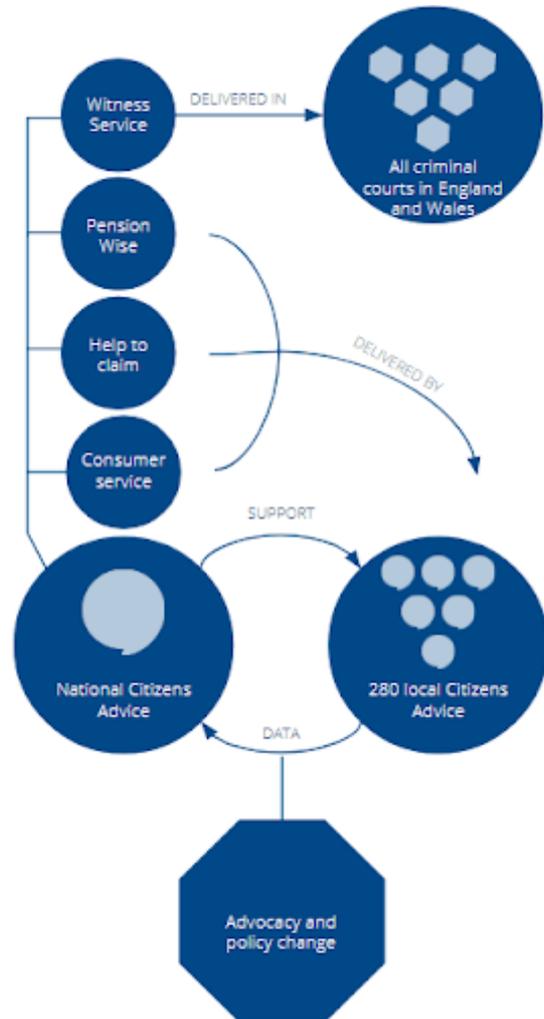
Universal Credit Help to Claim: advice and assistance to complete a Universal Credit claim and ensure that payments start.

Overview of Citizens Advice

The Citizens Advice service is made up of the national charity and its network of over 270 local Citizens Advice charities in England and Wales.

Taunton sits within the national network of independent charities, which is run by a mixture of 950 national staff and 6,300 local staff, 18,300 local volunteers and 2,500 Witness Service volunteers, who are all highly trained.

Locally, advice is offered from approximately 2,550 locations. The Witness Service is available in all criminal courts across England and Wales.



The Citizens Advice aims:

To provide the advice people need for the problems they face.

To improve the policies and practices that affect people's lives.

The Citizens Advice principles:

To provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities.