

Prospective Trustees Briefing Pack & Role Profile

Citizens Advice: A National Organisation

We exist to shape a society where people face far fewer problems. Our national charity and network of local charities are united by this common purpose.

We're driven by our ambition to make things better for people, individually and collectively. We're driven by the power of good advice, to help people solve their problems. And we're driven to change the underlying causes of problems, through our work with governments and other organisations.

Our Missions

Our three service-wide missions are:

1. Provide advice fit for the future - we'll be there for people when they need us in the ways that help make the biggest impact
2. Close the gap - we'll end the disparities in access and experience for marginalised people
3. Take early action - we'll prevent more people reaching crisis by addressing problems earlier

We give advice to millions of people

Our network of independent charities [offers confidential advice online, over the phone, and in person](#), for free. When we say we're for everyone, we mean it. People rely on us because we're independent and totally impartial. We help millions of people every year. In 2022-23, this included:

- 42.7 million visits to our website
- 457,000 people helped face to face (more than double the previous year)
- 1.8 million people using our phone service
- 895,000 helped by email or webchat
- 79,000 witnesses supported through the Witness Service

In total we helped over **2.66 million people** find a way forward with one-to-one advice. Our advice website had over **60 million views** of our online self-help advice. We provide support in approximately **1,600 locations** across England and Wales with **14,000 volunteers** and **8,843 staff**.

We speak up for our clients

No one else sees so many people with so many different kinds of problems, and that gives us a unique insight into the challenges people are facing today. With the right evidence, we can show big organisations – from companies right up to the government – how they can make things better for people.

We see how problems can be linked. By helping people with the underlying cause of their problems and making sure they don't get worse, we save the government and public services hundreds of millions of pounds every year.

We also look out for people as the statutory consumer watchdog for the [energy](#) and [post](#) industries. We show where things are going wrong and how to help make it better for people.

We make a difference

84% of people using our local services would recommend us to a friend.

Our service saves society money. In 2022-23 the advice we delivered directly saved government and public services at least **£681 million**. For every £1 spent on the service, we benefit our clients by **£13**. We estimate our value to society at **£4.7 billion**.

Citizens Advice – Hart: An Overview

Citizens Advice – Hart District (CA Hart) is a charity (registration nr 1113777) and a company limited by guarantee (registration nr 5746008), and is regulated by the Charity Commission, the Companies Acts and Citizens Advice's national organisation. The charity is governed locally by a Board of Trustees, and, has a Chief Officer who is responsible for day-to-day management, a small number of salaried support staff as well as a large pool of volunteers who are trained to provide advice.

CA Hart delivers services throughout the Hart local government district, which includes Fleet and Yateley and has a population of approximately 101,000. CA Hart's offices are within the council buildings in central Fleet. CA Hart advises on a wide range of subjects such as:



- working to resolve debt worries,
- helping with claiming benefits entitlement,
- advising on housing and employment problems,
- dealing with queries regarding consumer and tax issues,
- answering questions about immigration,
- helping with family and personal matters.

CA Hart speaks up for change in social policies; from its clients' experiences it can see where services and policies are failing and campaign for change with local and national organisations.

CA Hart is an independent organisation but does receive approximately half its funding from Hart District Council, and raises the remaining funding through grants, donations and project funding. The funding of the organisation is a continuing challenge.

Objectives

Our aim is to continue to develop and adapt our service to provide an increasing level of social value to our local community. Our objectives from our business plan are therefore to:

1. Enhance accessibility and reach
2. Develop our workforce in an inclusive and adaptive environment
3. Drive impact, value & sustainability of our service
4. Create & strengthen collaborative partnerships
5. Enable through education

For more information visit our website <https://citizensadvicehart.org.uk/> where you will also find our latest Annual Report and Accounts.

CA Hart Trustee Role Profile



What is the role?

05 August 2024

The role of a Trustee is to ensure that CA Hart is run as effectively as possible for our clients, so we create the maximum amount of benefit to the people of our community. It therefore involves:

- Agreeing the strategic direction and financial targets via the business plan,
- Approving key policies that we operate under,
- Monitoring performance against a range of key measures to ensure our financial, client and quality targets are achieved,
- Ensuring that there is strong governance around all areas of operation, with clear lines of accountability, including having robust financial control systems to safeguard the organisation's resources and a risk management framework,
- If you have the relevant experience, undertake a lead role in one of the portfolio areas (e.g., HR, Finance, Risk, EDI, Service Delivery, Information Assurance).



What's in it for you?

- make a positive impact for people in your local area by ensuring CA Hart is sustainable and meeting the needs of the community,
- meet people and build relationships with other trustees, staff and volunteers,
- develop your Board level skills, particularly in governance, leadership and strategy.

And we'll reimburse any reasonable expenses too.



What do you need to have?

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

- have the necessary experience / expertise in the area being recruited for,
- understand and accept the responsibilities of a trustee and be willing to support the Citizens Advice aims, principles and policies, including confidentiality and data protection,
- be able to exercise independent judgement and demonstrate integrity,
- have good numeracy skills to understand accounts with the support of the treasurer,
- be non-judgmental and respect different views, values and cultures, have good listening, verbal and written communication skills,
- be willing to commit the time to undertake the role.



How much time do you need to give?

To help you get up to speed with the organisation, an induction programme will be tailored for you over the first three-months of your time with us. The programme will involve meeting all the key people in the CA Hart, training on the systems we use and getting a more detailed understanding of our role and our client base. The induction work can happen at a time convenient to you and should take approximately x hours.

The Trustee Board usually meets eight times a year in the early evenings for approximately two hours. So, the minimum expectation is that you will attend these meetings having read the meeting papers. This should therefore be a commitment of 4-5 hours for each meeting.

In addition, there will be an ongoing requirement (after your induction) to undertake a limited amount of online training to help your knowledge remain current.

However, there are many opportunities that arise for trustees to be a lead in a particular portfolio area and to get involved in projects, particularly where their experience is relevant. In addition, we would encourage you to attend communications sessions with volunteers and staff. This is the area where we can be flexible about the time spent, so if you have concerns about the time commitment come and talk to us.



Valuing inclusion

Our volunteers come from a range of backgrounds as we welcome applications from all members of our community that have the attributes for the role.