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# Perth CAB Trustee Recruitment Pack

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# A message from our Chair

Thank you for your interest in becoming a trustee of Perth Citizens Advice Bureau. We believe there has never been a more crucial time for our services given the challenges that so many people face in the current environment.

As a trustee of the Board, you will have the opportunity to contribute to the overall governance and direction of the organisation in providing these vital services for our clients. We operate an open and collaborative environment, and everyone is encouraged to contribute in their own way.

The role is varied and interesting, can cover all manner of topics, and of course provides a real sense of achievement when we see the benefits of what do, whether in terms of the numbers of people we have helped, or in the direct financial benefit to our clients.

If you feel this could be of interest to you, we'd be delighted to discuss further.



David Abercrombie  
Chair  
Perth Board of Trustees

# About Citizens Advice



Bureaux were set up in 1939 to give an emergency service during World War Two. There was a need for help with personal problems such as those of evacuees, with allowances and pensions, and with tracing soldiers lost in battle and contacting prisoners of war. Offices were improvised in air raid shelters and rest centres. With transport often disrupted, bureaux went to the people in mobile advice units, which toured badly bombed areas. Glasgow Bath Street CAB was the first to open in Scotland in 1939, and others in Edinburgh, Aberdeen and elsewhere followed rapidly, operating under the Scottish Council of Social Service. More than 60 bureaux operated in Scotland during World War Two.

After the war, the need for the CAB Service was still great. There were employment and training difficulties, while the housing shortage caused grave problems for many. The new 'welfare state' social security measures seemed intricate and confusing to many who needed help.

A broader concept of bureau work began to develop. As well as strengthening and expanding its information and advice to individual members of the public, the service began to use the knowledge it had gained to influence the changes in the new post-war society. Working closely with both local and national organisations, over the years it became increasingly involved with discussion on the formation of government social policy, as well as providing specialist services.

The Scottish Association of Citizens Advice Bureaux (SACAB) has been an independent charitable company, limited by Guarantee, since 1984. In 1998, the Association changed its operational name to Citizens Advice Scotland.

The Citizens Advice Bureau (CAB) Service is the largest independent advice service in Scotland, and provides advice for in excess of 766,000 issues annually.

It also draws on its experience of client's problems to suggest where improvements can be made to the social policy and services of local and national government.

The CAB Service in Scotland aims:

- **to ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them, or through an inability to express their needs effectively and equally**
- **to exercise a responsible influence on the development of social policies and services, both locally and nationally**

The CAB Service is independent and provides free, confidential, and impartial advice to everybody regardless of race, gender, sexuality, age, religion or disability. It has been strongly committed to justice and equality ever since

Bureaux rely primarily on local authorities for their funding, mainly paid either through service level agreements or contracts. CAS is funded mainly by the Department of Business, Energy and Industrial Strategy (BEIS). The service also receives donations from the private sector and charitable trusts. Individual bureaux may get money from other parts of the public sector, such as health authorities, or may get funding for specific projects from trusts funds and the National Lottery Community Fund.

The responsibility for developing CAS policy lies with the CAS Board of Trustees, which consists of bureau representatives and people external to the service. The CAS Trustees and Honorary Officers are elected at the Annual General Meeting (AGM).

# About Perth CAB

Perth CAB has been a member of CAS since 1974 offering free, impartial and confidential advice to Perth and Kinross Council area. We deliver support and guidance on a range of topics, giving people the information they need to deal with any situation and improve their lives

Every year Perth Citizens Advice Bureau works with nearly 5000 clients and helps resolve about 15000 issues, these figures vary from year to year. We can offer advice, guidance and information in a number of specialist areas, including benefits, consumer issues, immigration, workplace disputes and much more. Formed in 1974, incorporated as a company limited by guarantee in 1994.

We are a registered charity and have been based at 7 Atholl Crescent since March 2010.

Perth CAB receives core funding from Perth and Kinross Council to provide Generalist Advice and the Debt Service. In addition, project funding is received for specific projects from a variety of funders. Current projects include: Universal Credit Help to Claim, Money Talks, EU Settlement Scheme, PASS patient advice project, ASAP Armed Services Advice Project, Pensionwise, Energy advice, Independent Age advice for older people and our financial inclusion advice project with Trussell Trust.

## The bureau gives advice on the following topics.

- **Debt and Money**
- **Benefits**
- **Work**
- **Consumer**
- **Family**
- **Housing**
- **Law and Courts**
- **Immigration**
- **Health**

Advice is delivered through a blend of face-to-face, telephone, email, webchat and video calls.

The Bureau is led by a Chief Executive Officer (CEO) supported by a team of 29 paid staff and 30 volunteers.



# Our Principles

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**free**

**confidential**

**impartial**

**independent**

**accessible**

**effective**

**accountable**

**right to  
decide**

**voluntary**

**empowerment**

**information  
retrieval**

**generalist**

# Our Strategic Objectives

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**1. Maintain financial strength & growth**

**2. Develop a comprehensive 5 star multi channel service**

**3. Inclusive & accessible to all citizens of Perth & Kinross**

**4. Ensure staff and volunteers thrive in their roles**

**5. Strengthen the local brand and ensure strong stakeholder relationships**

**6. Review premises options post-Covid**

# The role of the Board of Trustees

The Board are there to lead, control and monitor the organisation's activities. It's the part of the bureau with formal power and responsibility, as detailed in the Memorandum of Association and the Articles of Association which are legal documents.

**The prime functions of a Board of Trustees are:**

- **develop direction, strategy and planning**
- **manage risk and ensure compliance and accountability with the governance, external regulation and law**
- **to ensure the bureau has sufficient funds and resources**
- **to ensure the bureau meets the standards of the membership scheme**
- **to meet legal obligations**
- **to act as the employer of all paid staff.**

Trustees should not be directly involved in the day to day running of the Bureau or interfere with the work carried out by members of staff.

**In order to carry out the functions of a governing body, the Board of Trustees needs a body of people who between them can:**

- **understand what the bureau aims to do, and why**
- **give the bureau stability and a plan for the future**
- **earn and retain the respect of important and influential people with whom the bureau has to deal - especially funding bodies**
- **exercise responsible control over the finances of the bureau**
- **ensure it has sufficient resources (financial, human, etc)**
- **oversee implementation of equal opportunities and other Association policies**
- **offer enough time, knowledge, skills and other qualities to carry out the work of the committee**
- **employ paid staff and manage, supervise and support the bureau manager.**

To do all this effectively, trustees should represent the interests of the social, cultural and ethnic spread in the community. A board with a range of knowledge and experience is dynamic and members need to be able to work well together and to respect each other's contribution and background. While day-to-day control is delegated to the CEO, the Board retains overall responsibility.

# Person Specification

- Be committed to Perth CAB and have sufficient time and willingness to contribute effectively to board related matters
- Commitment to the aims, principles and policies of the CAB Service, including those relating to equal opportunities, independence and social policy
- Willingness and ability to act in the best interests of the bureau
- Willingness to gain knowledge of local needs and resources
- Ability to understand their responsibilities as trustees and employers
- Have a reasonable understanding of or be prepared to further develop your knowledge about the legal, financial, audit and regulatory requirements of the charity
- Willingness and ability to learn, and to develop and examine their own attitudes
- Be able to work effectively and collaboratively as part of a team
- Be willing to speak up and remain independent of influence
- Manage risks with a balanced and informed approach
- Be committed to the principles of the trustees code of conduct; organisational purpose, leadership, integrity, board effectiveness, equality and diversity





# Terms and Conditions

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## Time Commitment

Board meetings are held 6 times a year and last approximately 2 hours. You will be asked to attend two development sessions a year.

In addition trustees are expected to join a subcommittee and support staff events and campaigns through the year.

Trustees should be prepared to spend between 4-6 hours each month on charity business

## Location

The charity is based in Perth. We are committed to hybrid working so will operate on a blend of virtual and in person meetings.

## Technology

You will be expected to be familiar in the use of technology and will be given access to our Teams platform allowing you to access all the information you will require for charity business

## Remuneration

The role is offered on a voluntary basis. Out of pocket expenses will be reimbursed.



# How to apply

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Please complete our application form. If you have any difficulties you can get in touch with [karen.campbell@perthcab.org.uk](mailto:karen.campbell@perthcab.org.uk)

if you would like an informal chat to discuss the role please contact our CEO [jane.adams@perthcab.org.uk](mailto:jane.adams@perthcab.org.uk)

Once we have received your application form you will be invited to an interview with David Abercrombie, our Chair, and Jane Adams, our CEO.

Closing date for applications is Friday 28th April 2023



# citizens advice bureau

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**@PerthCAB**