

# Perth Citizens Advice Bureau



## Board of Directors Trustee

Applicant Information Pack



# Thank you for your interest in our vacancy!

Perth Citizens Advice Bureau (CAB) has been operating in Perth and Kinross since 1942 and throughout the past eight decades we have been responding to the needs of citizens and providing advice and information on a range of topics including money advice, benefits and debt, energy advice, consumer issues, family issues, employment, immigration and housing issues.

We have a team of 34 staff and 30 volunteers and together we support over 8,000 individuals each year.

The CAB service is vital for the communities we serve, from Kinloch Rannoch to Coupar Angus, from Comrie to Kinross. We support any citizen in Perth and Kinross with high quality advice and information supporting them at all stages of life.



# 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 we 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

# Our 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

# Our Principles

**Free**

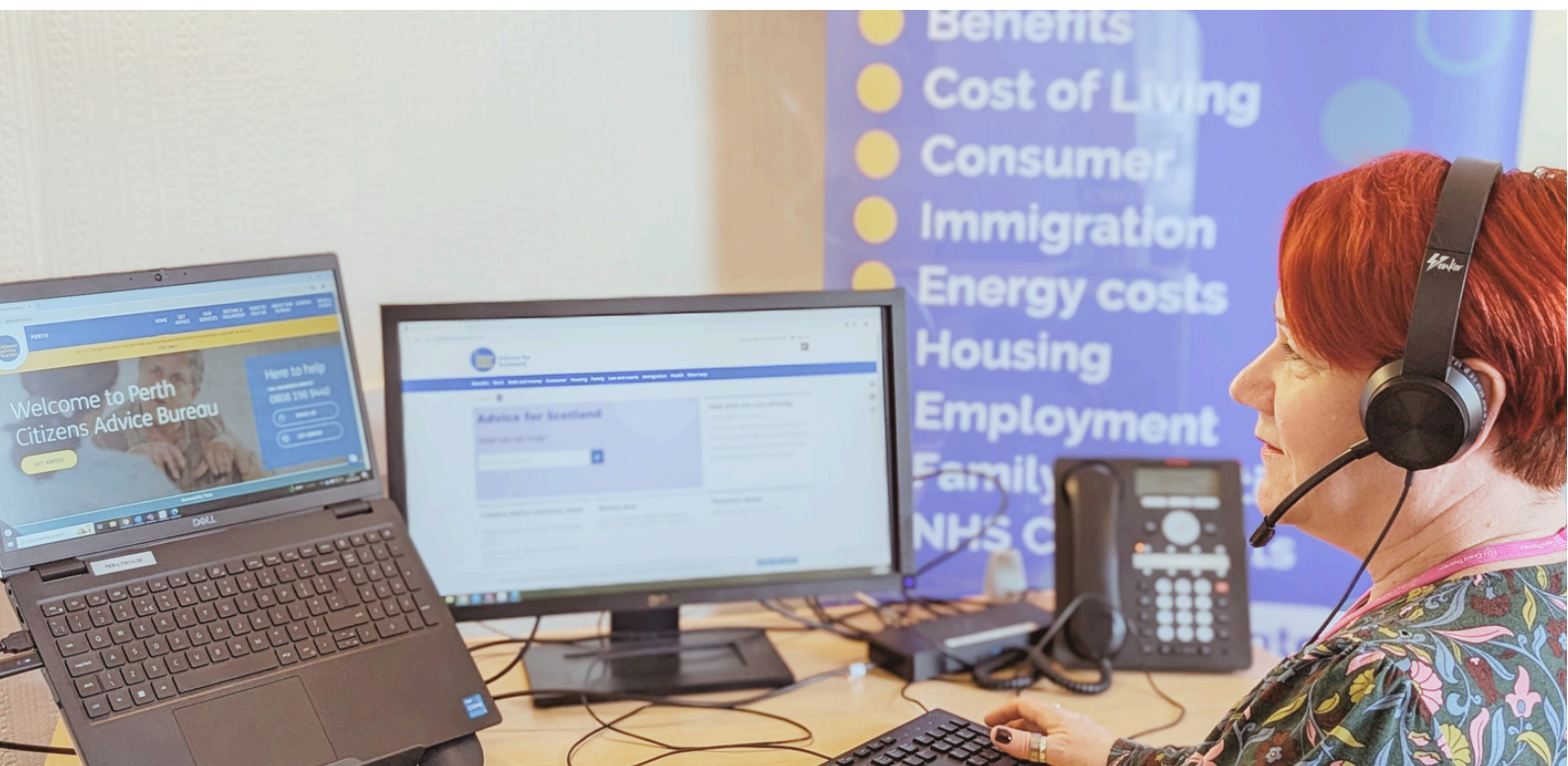
**Confidential**

**Impartial**

**Independent**

**Accessible**

**Effective**



# Our Vision

- We believe that everyone in Perth and Kinross should have access to free, impartial and confidential advice that helps them make informed decisions whenever they need it
- Our vision is a Scotland where everyone has the advice and information they need to realise their rights and where barriers to accessing those rights are effectively challenged

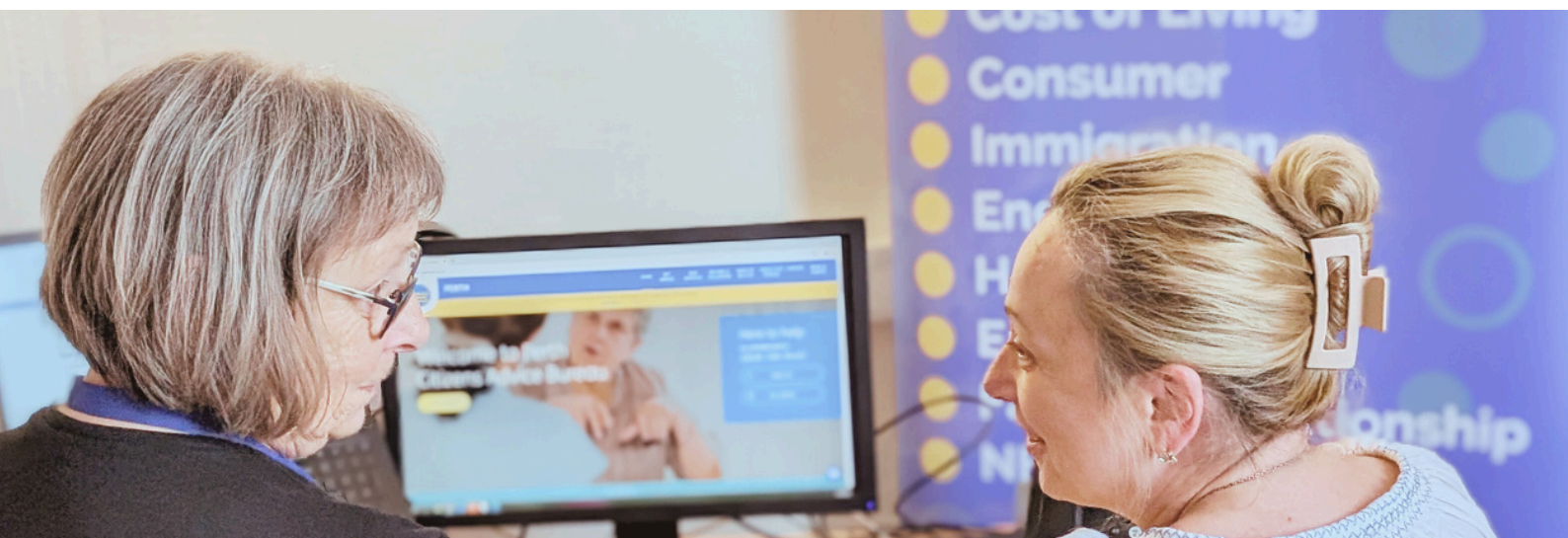
# Our Mission

- We help people navigate systems and access their rights
- We build resilience in local communities
- We support the realisation of human rights
- We help change policies and practices to ensure they work for people



# Our Strategic Objectives

- **Maintain financial strength & growth**
- **Develop a comprehensive 5 star multi channel service**
- **Inclusive & accessible to all citizens of Perth & Kinross**
- **Ensure staff and volunteers thrive in their roles**
- **Strengthen the local brand and ensure strong stakeholder relationships**
- **Work towards a net-zero position**



# The Role

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

## Time Commitment

Board meetings are held 4 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

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

if you would like an informal chat to discuss the role please get in touch to arrange this by email [finance-hr@perthcab.org.uk](mailto:finance-hr@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 11th October 2024

