



Dear Prospective Trustee

Thank you for your interest in the trustee positions at Citizens Advice Merton and Lambeth (CAML). This pack sets out more information about the charity, the Board, the roles we are seeking to fill, and how to apply.

We are excited about the future of the organisation and are looking for energetic, talented and committed individuals to help drive the organisation forward to continue its incredible work for the people of Merton and Lambeth. We hope that describes you!

### **What we do**

CA Merton and Lambeth is the leading advice charity supporting individuals and families who live, work or study primarily in the London boroughs of Merton and Lambeth, and across South London. We also work to raise awareness and understanding of the challenging issues affecting individuals and our communities.

We were one of the first Citizens Advice services to open our doors after war was declared in 1939. 80 years later, our support and services are as important today as they were when our work began.

We are part of the national Citizens Advice network of around 280 local charities that deliver advice across the country.

Our information, support and advice services are provided via telephone, online and face-to-face. We run three offices open to the public in Morden, Mitcham and Streatham Hill. We also provide information and advice through outreach services in local community venues. Our aim is to empower people to better help themselves. But we are always here with further support and when needed.

### **CAML in 2019**

CAML is at an important point in its history. Demand for our services continues to accelerate as legislative changes and reforms affect more residents. The two boroughs we serve contain some areas of enormous wealth and affluence, but also feature areas of significant poverty and deprivation where our services are most depended upon.

At the same time, similar to many charities, we face funding challenges – not least given the majority of our funds come from our local authorities. Our current turnover is just under £1m a year. Like others, CAML has faced a number of funding-related challenges in the last few years which has coincided with relentless changes in government policies.

The organisation has a strong foundation to deliver in this difficult environment – particularly with a workforce that is committed to our clients and expert in giving quality advice. We also have positive working relationships with our funders and councils, and a strong local reputation.

### **Our leadership**

The operational leadership and management of CAML is carried out by our CEO, Suzanne Hudson, with two senior managers and a team of around 22 staff and 85 volunteers. We currently have seven trustees – short biographies are available here: <https://www.caml.org.uk/our-trustees/>

### **The role of the Board**

Each trustee has a responsibility to contribute to discharging the Board's responsibilities. We do this by:

- Maintaining an understanding of the business of CAML
- Regularly preparing for, attending and participating in meetings
- Actively contributing to setting of policy and strategic direction, defining goals, setting targets and evaluating performance
- Monitoring our services, ensuring compliance with our governing documents and policies and monitoring maintenance of Citizens Advice standards
- Monitoring the charity's financial position and ensuring it operates within its means and objects with clear lines of accountability for day-to-day financial management
- Supporting charity development through participation in agreed projects
- Supporting charity's campaigns and research work
- Actively seeking to further CAML's strategic objectives and acting in its best interests at all times.

Above all we are looking for people with strategic vision and independent judgement who together can support the charity and its executive team. As trustees we look to be visible to our staff and volunteers engaging in ways to recognise the excellent work they do. Each trustee is expected to visit offices spending time with services at least once a year.

You will be a genuine team player, able to support colleagues, input constructively and positively to discussions and to support and uphold collective decisions.

As a trustee you will have a commitment and empathy consistent with the charity's values and objectives and will act as a positive and genuine advocate promoting the work of the charity both within your personal networks and to the wider world.

### **The commitment we need**

Each trustee attends quarterly Board meetings and is a member of one of the delegated authority sub committees – Finance and People – which also meet once a quarter. We also have an annual Awayday to review strategy and plan ahead.

While the precise nature will differ month-to-month, this is likely to average at around **5 to 6 hours a month**. This allows for regular board and committee meetings, the reading in advance of these, ad-hoc actions and discussions, and undertaking visits to CAML's services.

Board and sub-committee meetings take place on weekday evenings, and are largely held in one of CAML's offices in Morden, Streatham or Mitcham, most often the last of these.

Across the Board, we also make sure that key events such as Volunteers Week and social activities are attended.

### **Particular skills/experiences we're seeking**

We are looking for **four new trustees** to bring our dynamic Board up to full strength and to compliment current Board members. The skills/experiences we are seeking include:

- **Financial:** Strong financial acumen with an understanding of financial pressures charities face;
- **Human resources:** Experience in human resources-related law and practice and or volunteer management;
- **Fundraising:** It is important that CAML is looking upwards and outwards for new sources of income. Fundraising expertise to support the chief executive would further the charity's ability to maintain our high levels of service;
- **Public sector commissioning and delivery:** As statutory funding becomes tighter and the nature of the advice sector evolves, we are looking to strengthen the Board's expertise and insight to support the executive team to take CAML forward.

### **The benefits of being a trustee with CAML**

Although the role of a trustee is unpaid (reasonable out of pocket expenses are reimbursed), there are many reasons to join us, including:

- Being a trustee is one of the most powerful ways in which you can contribute to your local community and to a cause you really care about.
- Corporations of all sizes are taking voluntary and community enriching activities more seriously with trusteeship considered an effective method of professional development and community engagement available to employees.
- Being a trustee is a fantastic way of developing your strategic experience and oversight, giving you the opportunity to develop and hone your critical thinking, problem solving and analytical skills.
- Being a trustee can open up your professional network.

### **How to apply**

We operate a quarterly schedule of trustee interviews while vacancies exist. After reading the supporting information, interested applicants are asked to email the following to [recruitment@caml.org.uk](mailto:recruitment@caml.org.uk).

Current CV

A covering letter telling us why you would like to be a trustee with CAML.

Signed copy of the Declaration

Diversity monitoring form.

All applications are considered by trustee panel, with shortlisted candidates then invited to an interview.

### **Any questions?**

If you would like to talk privately about these roles and responsibilities, or need more information, please contact the Chair, Jac Nunns, on [jac.nunns@caml.org.uk](mailto:jac.nunns@caml.org.uk)

**We are registered with the Information Commissioner's Office and will process your personal data in accordance with the General Data Protection Regulation and Data Protection Act 2018. Please refer to our online Privacy Policy at [www.caml.org.uk](http://www.caml.org.uk) for more information on how your personal data will be processed and stored.**