



Board of Directors

Applicant Information Pack



Thank you for your interest in our vacancy!

South West Aberdeenshire Citizens Advice Bureau (SWACAB) has been operating since 2009 and throughout the past 16 years 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 14 staff and 23 volunteers and together we advise on over 8,000 client issues and delivering over £1 million in client financial gains each year.

The SWACAB service is vital for the communities we serve, from Westhill to Kemnay, from Aboyne to Braemar. We support any citizen in South West Aberdeenshire with high quality free, confidential and impartial 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 South West Aberdeenshire 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.

Owen O'Donnell, Chair South West Aberdeenshire Board of Directors



About us

Our bureau exists to:

Ensure that people do not suffer through lack of knowledge of their rights and responsibilities, the services available to them, or through an inability to express their needs effectively.

Exercise a responsible influence on the development of social policies and services, both locally and nationally.

Lift the burden of worry from clients who do not know what to do by giving them researched options.

Provide free, confidential and impartial information and advice.



About us

We believe that everyone in South West Aberdeenshire 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

Responded to over 100,000 client enquiries in the last 10 years.

Delivered £20 million + of client financial gains in the last 10 years and volunteers have contributed £1 million in economic value



Strategic Framework

Mission

To provide free, impartial and confidential information and

Vision

Our vision is for a fairer Scotland

Values

- person-centred
- empowering
- supportive
- inclusive
- collaborative

Goals

- We will provide top quality information and advice to clients to help break down the barriers they face and to build a more equitable, inclusive and sustainable society
- We will make SWACAB the best place to volunteer by putting volunteers at the heart of everything we do
- We will work with trusted partners in our community who embody our values and principles

Strategies

Impact

Focus on outcomes for clients

Inclusion

Use our power, privilege and platform to dismantle structural inequities

Continuous Learning

Align ourselves to clients, adapting our information & advice models to drive impact & inclusion

Collaboration

Work with Volunteers, people with lived experiences and partners to build an environment where people can flourish

Org Health

Build strong foundations with our people and culture at heart, operating in a sustainable way

**citizens
advice
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Our Strategic Objectives

Mindset & culture

Develop a behaviours-based, impact driven team and culture in which a growth mindset is fostered, two-way feedback is encouraged, knowledge and expertise is shared and which has equity, diversity, inclusion and belonging at its heart. Placing wellbeing of our teams and our clients at the core.

Advising for impact

Refining and embedding our understanding of the most impactful ways of advising by actively using data to inform our decision-making, outreach and measure impact.

Market leading support

The Bureau has the confidence and capacity to deliver responsive, impactful and continuously improving advice, in an equitable, inclusive and accessible manner. Advice meets the needs of the most marginalised clients and places wellbeing at its heart. We will monitor caseloads and capacity to ensure we can deliver the best advice for clients.

Campaigning for a just Scotland

Stretch our own and the sector's ambition by bringing poverty and inequities into focus, evidence and insights to actively influence and inform access to a range of rights.

Led by volunteers, informed by clients

Nothing about us without us. Proactively engage with all our volunteers in the design, development, governance and delivery of our information and advice services. Ensure client experience and views form the basis for prioritising services and the client journey.

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The focus of the strategy is to keep growth and consolidation in balance and ensure we have a team that can achieve both these priorities in parallel.

We can become bigger and better if we become stronger and work smarter.

The key conclusions of this strategy are:



SWACAB provides critical information and advice services for the people of South West Aberdeenshire and demand continues to increase, as does the complexity of presentations.



Well planned investment in SWACAB, backed up by ongoing organisational development and the support of Citizens Advice Scotland, will deliver a stronger and more sustainable business model.



We recognise that we must consistently invest in our people, facilities and services so we can reach out to those most isolated or excluded.



This stronger organisation will also be able to better support community planning. This will be achieved through an evolving portfolio of services that addresses poverty and inequalities.



SWACAB'S focus is now to build from its hub at Westhill and create local outreach units that provide a more balanced and locally accessible infrastructure across the large territory it covers.



Looking forward, this firm foundation will also enable a truly ambitious vision for addressing poverty and inequalities in our region.



Our Priorities

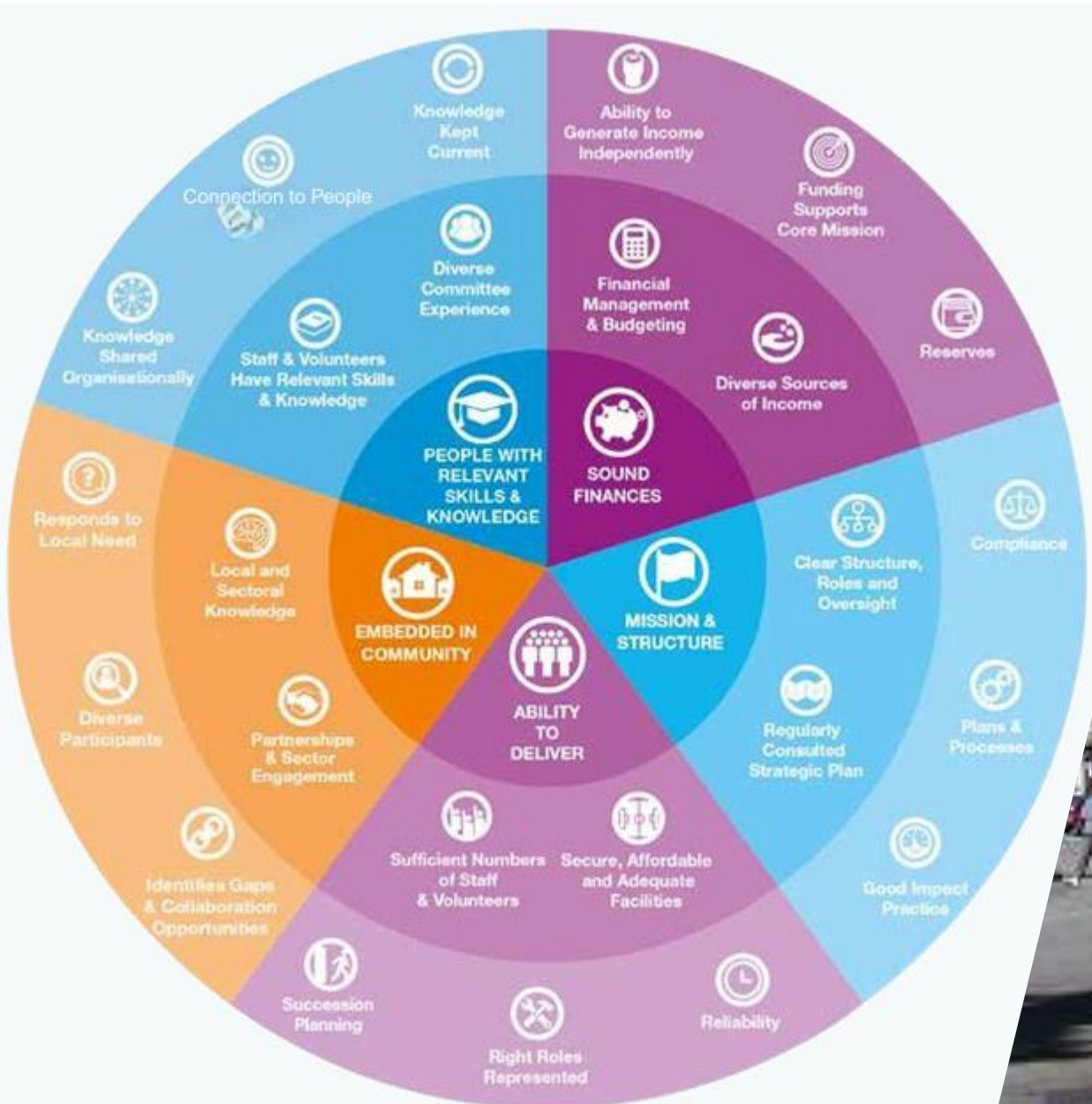
BECOME BETTER: Building on our strengths, being brave, innovative and learning from best practice to deliver continuous improvement across all aspects of our operations.

BECOME STRONGER: Developing the financial, governance, management and operational resilience to deliver on a long-term basis despite the challenging external environment and changing nature of public services. Smarter collaboration and partnership working will also enhance the strength and resilience of the organisation.

BECOME BIGGER: Smart use of infrastructure to grow access in local communities across SW Aberdeenshire, better communications to inform people of our services and grow the staff and volunteer teams to meet increasing demand.



Becoming Better – Our Target Model



Becoming Better

Efficient operations and a great client experience

SWACAB is committed to a process of continuous improvement to deliver the quality, efficiency and flexibility of operations to back up any investment. Key aspects include:



By expanding our 'hub and spokes' design we will immediately gain by being able to service local demand more effectively

Continuous Board, Staff and Volunteer development programmes with clear CPD goals.

Focus on communications and fundraising with dedicated resources to deliver on them.

Integrating technology and AI appropriately to help improve client services and support empathetic training for Triage Officers and Advisers.



Becoming Stronger



Efficient operations and a great client experience.

Building a fully resilient organisation with strong foundations and partnerships to put SWACAB at the heart of community information and advice services across the region. This will be underpinned by:

Financial resilience: SWACAB is committed to achieving a sustainable annual surplus on operations whilst building up an unrestricted cash reserve for investment

Operational resilience: SWACAB will continuously help develop our team able to operate to the highest standards in a bigger and better organisation. We will back this up with ongoing investment in systems to support efficient and effective operations, with a primary focus on health, wellbeing and safeguarding.

Resilient Governance: A strong & capable governance structure, and supporting mechanisms, to develop and lead this vision and work effectively with partners and stakeholders.

SWACAB will evolve governance and legal structures in line with CAS Member Standards and whatever is best for delivering on our strategy. This will include closer working arrangements and collaboration with partners.



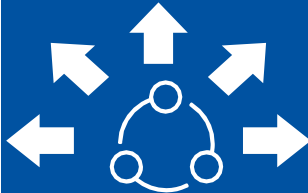
Becoming Stronger

Collaboration & Development

These firm foundations and working closely with stakeholders and trusted partners will allow us to develop and pursue an ambitious long-term vision for Community Information and Advice Services in the region. This vision will aim to deliver:



A strong Bureau capable of pushing against the tide



An influential partner and well connected Bureau



A capable bureau, resilient enough to keep aiming for the next summit



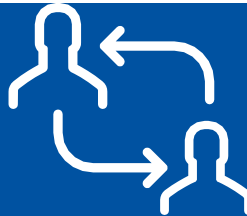
A valuable contributor to social and economic gains



A Bureau that continues to learn and share knowledge



A strong Bureau that cares about health, wellbeing and safeguarding



A listening Bureau that communicates effectively, is mindful and sensitive



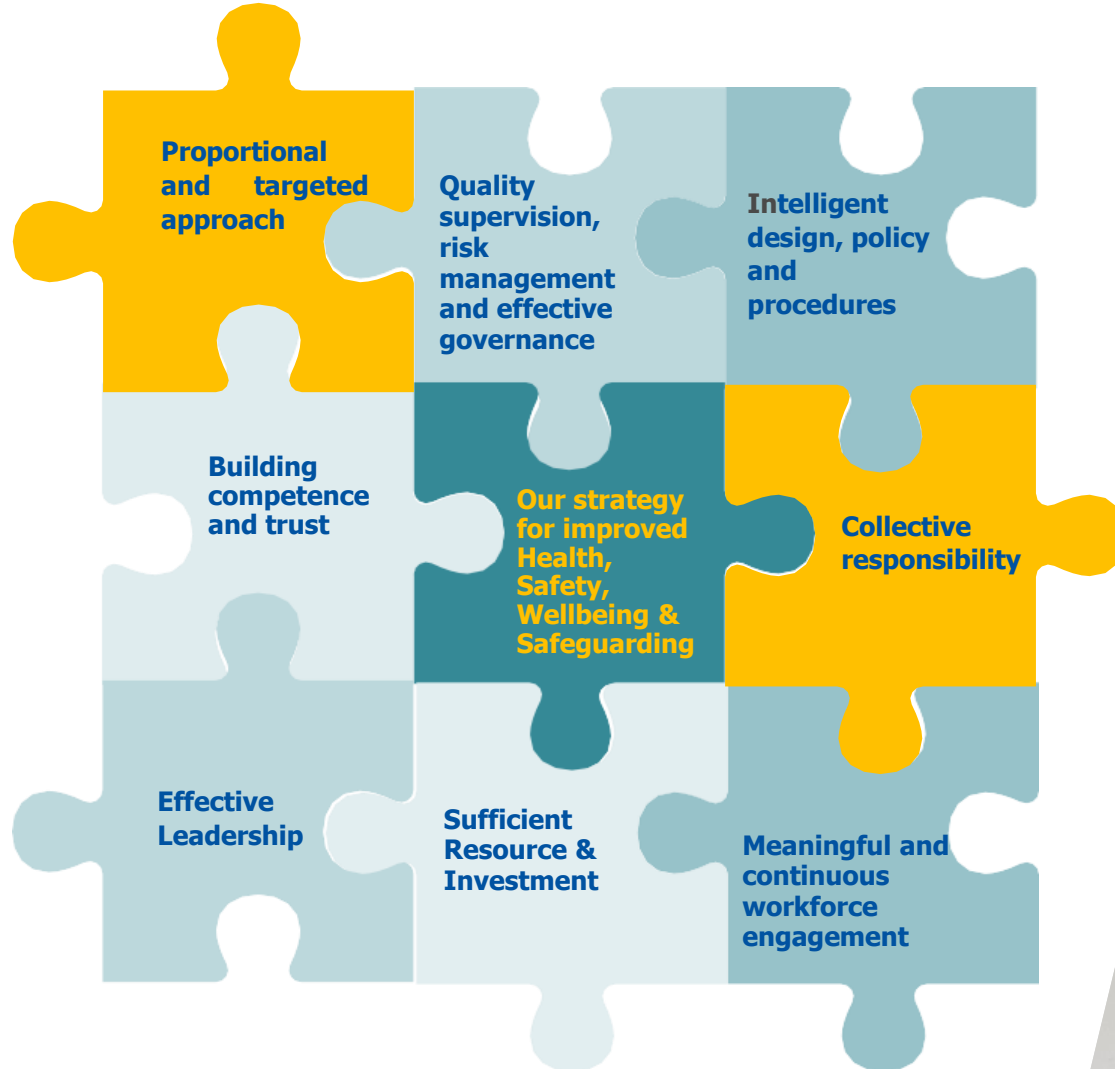
A Bureau focused on achieving outcomes for clients



Becoming Stronger

Focus on Health and Safety

One of the key pillars of our strategy is to ensure we are highly professional and responsible operator we will continue to make health, safety, wellbeing and safeguarding our key priorities.



Becoming Bigger

The aim here is to deliver more information and advice across our territory on a consistent basis, more accessibly and locally.

- **Intelligent use of existing facilities and partner resources**
- **Develop clusters of resources across the area**
- **Increase Outreach resources**
- **Grow Volunteer Numbers and place locally**



The Role of Trustee

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 CAS 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 Chief Officer.

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 CO, the Board retains overall responsibility.



Person Specification

Be committed to SWACAB 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 6-weekly and last approximately 1.5 hours. You will be asked to attend one strategy session a year.

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

Trustees should be prepared to spend between 2-4 hours each month on charity business, including training requirements.

Location

The charity is based in Westhill. We are committed to hybrid working so will work on the basis of a blend of virtual and personal 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.



South West Aberdeenshire

**citizens
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South West Aberdeenshire Citizens Advice Bureau is authorised and regulated by the Financial Conduct Authority FRN 617487, is a Scottish Charity No: SC037679 & Co Ltd by Guarantee No: 365959. Registered office: Suite 2, Westhill Shopping Centre, Westhill AB32 6RL.

How to apply

Please complete our application form or if you would like an informal chat to discuss the role please get in touch to arrange this by email.

**Grahame.Paterson@swa
cab.org.uk**

Once we have received your application form you will be invited to an interview with Grahame Paterson our Chief Officer.

We are particularly interested in hearing from people with Legal/Charity Governance, HR, Fundraising and Marketing skills.

Thank you.