

# Trustee Application Pack



# St Pauls Advice Centre

Working for Ashley & East Bristol

St Pauls Advice Centre  
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## Introduction

Welcome to St Pauls Advice Centre  
and thank you for your interest in becoming a Trustee Treasurer.

St Pauls Advice Centre is a specialist advice, information and casework service relating to debt and money, welfare benefits, and immigration issues.

The Trustee Board is committed to ensuring the service continues to be a community based service, delivering a high standard of advice and support to the people of St Pauls, East Bristol, Lawrence Hill and Fishponds.

We've put together this information pack which will tell you more about how you can apply to become a Board member and what being on the Board entails. In the pack you will find:

- About St Pauls Advice Centre
- Strategic priorities
- Overview of services
- The Board of Trustees - what is involved and what does it do?
- Role description and responsibilities
- Person specification
- Time commitment
- A description of the selection procedure
- Equality of opportunity and diversity
- How to make an application

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## About St Pauls Advice Centre

St Pauls Advice Centre provides free and independent advice, which changes people's lives for the better. The Centre has been providing advice and information to the people of St Pauls for over 40 years and more recently has extended its reach to include people living in East Bristol, Lawrence Hill and Fishponds.

Austerity has hit the community in which the centre works, very hard. Welfare Reform changes are having a huge impact, with fewer clients qualifying for disability benefits, more being paid at a lower rate, and working, low-income families struggling to make ends meet due to reduced tax credits. Also, the changes being brought about by Universal Credit loom large.

The Centre has not been immune to cuts in funding from statutory organisations but has worked hard to raise money and maintain services supporting our clients.

St Pauls Advice Centre is a strong and viable organisation. The organisation has good financial reserves, next year's funding has been agreed, and there is an experienced and very able director with a stable, experienced staff group.

The Board has eight friendly and active trustees, some from a community service background, who contribute to strategic and financial oversight. They are currently proposing growth in fund raising to meet the challenges of reduced funding from the City Council.

Challenges include how to adapt the service to growing demand and how to achieve our aim of finding more suitable premises or improving the current building.

We are seeking a treasurer to take forward strategic issues and lead the organisation through a period of change and potential growth.

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### St Pauls Advice Centre - Strategic Priorities

- Deliver a professional legal advice service
- Maintain, expand and develop services
- Provide an accessible approachable service that respects clients' needs
- Make a positive difference to the lives of local people and communities
- Lobby for social change

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### Services Overview

**Debt advice:** Most of our clients live on low incomes, earning the minimum wage, often on zero hours contracts and are reliant on welfare benefits. This leaves many of the clients unable to pay their priority bills such as rent, utilities and council tax.

**Immigration Advice:** Our current clients include refugees and asylum seekers from Somalia and Syria, as well as migrants from Europe, Asia and Africa. The Centre offers immigration advice, information and casework, and advice on many issues including British Citizenship, settlement applications and partner visas.

**Welfare Benefits:** Welfare reforms have led to benefit claims becoming increasingly bureaucratic and prone to error. The Centre is advising many vulnerable clients on how to apply for help through difficulties such as unemployment, disability and care demands, and how to appeal unfair decisions. With support, around 80% of appeals are successful.

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### The Board of Trustees for St Pauls Advice Centre – what is involved and what does it do?

The Board holds overall responsibility for strategy, employment and financial viability of the Centre, with operational activities delegated to the Director and other paid staff of the organisation. (See Roles and Responsibilities of the Trustee Board).

A typical Board meeting will consider strategic direction, and an update on recent work undertaken by the Centre, with a report from the Director. The Board reviews approves financial reports. Such documents are sent out several days in advance of the meeting.

### Role Description and Responsibilities of the Trustee Treasurer

- Oversee the financial affairs of the organisation and ensure that they are legal, constitutional and within accepted accounting practice.
- Ensure proper records are kept and that effective and appropriate financial procedures and controls are in place.
- Monitor and report on the financial health of the organisation.
- Oversee the production of necessary financial reports/returns, accounts and audits.
- Liaise with the Finance Officer, Executive Director, and accountant/independent examiner as necessary, to ensure the financial viability of the organisation.
- Make fellow trustees aware of their financial obligations and take a lead in interpreting financial data to them.
- Working with the Finance Officer, regularly report the financial position at board meetings (Variance report, cash flow, reserves).
- Oversee the timely production of an annual budget and propose its adoption by the Board of Trustees.
- Guide fellow trustees in appraising the financial viability of plans and proposals.

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### Person Specification / Qualities Required for Trustee Treasurer

#### Necessary:

- Understanding of, and commitment to, the work undertaken by St Pauls Advice Centre.
- An ability to think creatively.
- Integrity, tact and diplomacy.
- A willingness to devote the time and effort necessary.
- A willingness to speak their mind and to take decisions for the good of SPAC
- Ability to work effectively as a member of a team.
- Good independent judgment.
- Understanding of support and line management of paid workers.
- Knowledge of bookkeeping and financial management.
- Good financial analysis skills

#### Desirable:

- Experience of trustee and/or management committee work.
- Knowledge and experience of fundraising and finance practice relevant to voluntary and community organisations

### Time Commitment

- The Board meets bi-monthly. The meetings last approximately two and a half hours.
- Reading of all board materials as well as emails in-between meetings.
- Attendance at ad-hoc meetings will be required.
- Completion of trustee recruitment and induction when necessary.
- The overall commitment is approximately 10-15 hours a month, with considerable variation from week to week.

### Selection Process

The advertisement for the post will include a name and telephone number for any interested person to contact to discuss their potential application if they wish. Otherwise, any applicant should complete and return the application on the St Pauls Advice Centre website.

Applicants will be offered the opportunity to meet with the Director and representative of the Board for an informal discussion, to learn more about the Centre, the services provided and the role of the Board.

All applicants will be interviewed by a panel consisting of the Director and Trustees, who will make appointment decisions.

On appointment, the successful candidate can expect an induction programme, including a visit to the Centre to meet the staff, and to receive relevant paperwork, including the Memorandum of Association and recent board minutes.

### Equality of Opportunity and Diversity

St Pauls Advice Centre (SPAC) fully supports the principle of equality and diversity. We aim to encourage, value and manage diversity and we recognise that talent and potential are distributed across the population.

Not only are there moral and social reasons for promoting equality of opportunity, it is in the best interest of this organisation to recruit and develop the best people for our trustee opportunities from as wide and diverse a pool of talent as possible

### How to Make an Application

To make an application please complete the online form by clicking [here](#) or go to our website: [stpaulsAdvice.org.uk](http://stpaulsAdvice.org.uk). Closing date for applications: Open

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**For further enquiries:**



Contact an existing trustee to arrange an informal discussion

By Phone (leave a message)  
0117 955 2981)



By Email:

[trustees@stpaulsAdvice.org.uk](mailto:trustees@stpaulsAdvice.org.uk)