



# Trustee Information Pack

## **Citizens Advice Oxfordshire**

January 2026

# Citizens Advice service nationally

## **We help people find a way forward**

Citizens Advice (CA) provides free, confidential and independent advice to help people overcome their problems.

We are a voice for our clients and consumers on the issues that matter to them.

We value diversity, champion equality and challenge discrimination.

We're here for everyone.

## **We provide advice to millions of people**

We helped 2.7 million people face to face, over the phone, by email and webchat in 2024-25. There were also 44 million visits to our digital advice.

We help with everything from money issues to problems at work, housing to consumer rights. Sometimes a person has more than one problem, and often they are linked. We tackle issues in the round making sure people get all of the support they need.

## **We're a voice for our clients and consumers**

We have real time data from our millions of clients. This evidence helps us identify emerging issues, understand what is causing them and make recommendations on how to fix the problems.

We're also the statutory consumer watchdog for the energy and post industries, meaning we advocate on behalf of consumers in these markets.

## **We're a part of the local community**

We're in 2,300 community locations (including GP surgeries, libraries and courts) in England and Wales. We also give advice on consumer rights on our consumer helpline, and support witnesses in courts through the Witness Service.

## **We're a network of independent charities**

We're a network of around 260 independent local charities across England and Wales. Our services are provided by over 16,000 trained volunteers and 6,500 paid staff. Each local Citizens Advice charity is a member of the national Citizens Advice charity. All together we form the Citizens Advice service.

## **We make a difference**

77% of the people we help say they would not have been able to solve their problem without our support. 85% of people using our local services would recommend them to a friend

# Introduction from Phil Baker

## Chair, Board of Trustees – Citizens Advice Oxfordshire

Thank you for your interest in applying for the role of Trustee at Citizens Advice Oxfordshire (CAOX).

Citizens Advice Oxfordshire provides confidential and impartial advice and information services to those that need it across the four District and City Councils areas of Oxford City, South Oxfordshire, Vale of White Horse and West Oxfordshire. Our charity has opened a new chapter following the recent merger of three smaller Citizens Advice organisations in April 2025 to create a new organisation that will be more resilient and fit for the future. We have a history of delivering services that spans more than 50 years in Oxfordshire, and we fully expect to be needed for the next 50 years.

The Board is made up of a group of dedicated and experienced individuals, some in retirement and some pursuing demanding careers – all giving of our time freely and enjoying being associated with Citizens Advice and its vital work.

We're looking for three new Trustees to join our Board to help steer our organisation through the next stage of its development and evolution. The work will be challenging and rewarding as we consider the choices we need to make to ensure CAOX continues to operate to the very highest standards.

This is a very exciting time for us; we look forward to receiving your application.



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**Phil Baker, Chair – Board of Trustees**

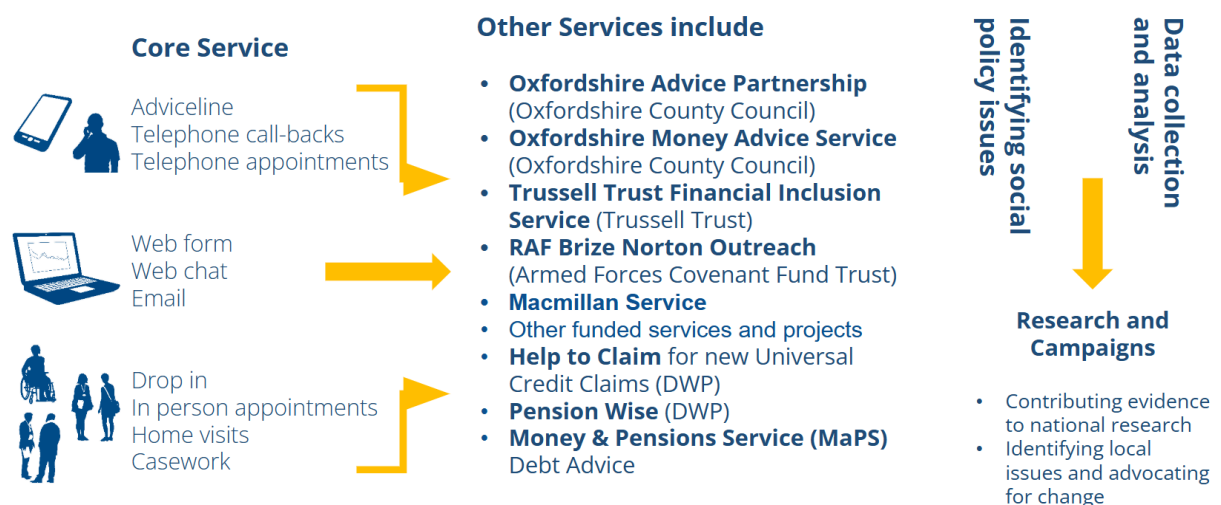
# About Citizens Advice Oxfordshire



Citizens Advice Oxfordshire provides advice services by telephone, email, webchat and in person. We have 260 volunteers, 86 staff and 8 trustees. We operate from 6 main advice centres in Abingdon, Didcot, Henley, Oxford, Thame and Witney. We also have additional outreach centres in a number of locations. Last year we helped over 21,000 clients with more than 81,000 issues.

We give advice on many issues, including; debt, benefits, employment, housing, consumer rights and relationship problems. We believe no one should have to face these problems without good quality independent advice.

We're an active campaigner for social justice in the local area and use the insight we get from the advice we give to influence local social policy.



# About the role – Trustee, CAOx

We're looking for three new Trustees to join our vibrant and active Trustee Board. We need people with strategic vision, independent judgment, energy and a willingness to give time and commitment to being a Trustee. In particular we are looking for individuals with specific skills and experience in finance and accounting, UK legal practice (not specifically Charity Law), marketing and communications.

The Board's primary purpose is to maintain the highest standards of governance, set the strategic direction of the charity and support the Chief Executive and team to ensure we're delivering the highest quality service to our clients each and every day.

We meet as a full Board every quarter, with sub-committees covering People/HR, Finance and Governance meeting prior to each board. All Trustees are expected to join at least one sub-committee, either leading or contributing depending on specific skills and experience. The default arrangement for Board and sub-committee meetings is early weekday evenings on-line. In 2026 we intend to hold at least one Board meeting in person to enable greater interaction. In addition, we currently hold an autumn AGM - this year October 14, 2026.



We operate a two-to-three year rolling Business Plan, where we're always in Year One. The Board is responsible for creating, shaping and monitoring performance against the plan. Each year we meet for a day to review existing progress and update the plan for future years.

You will need to be comfortable leading change within an organisation and representing what we do externally. Communication and influencing skills will need to be finely tuned for you to succeed in this role.

You will be an ambassador for Citizens Advice Oxfordshire and you'll help shape and drive our future agenda.

And finally, you need to be passionate about what we do.

# Role Description



## Main duties and responsibilities

Each individual member of the trustee board has a responsibility to contribute to the discharging of the board's duties. They can do this by:

- maintaining an awareness of the business of the charity
- taking responsibility for his or her own learning and development
- regularly attending, preparing for and taking a full part in meetings
- actively contributing to setting policy and strategic direction, defining goals, setting targets and evaluating performance
- monitoring whether the service complies with its governing document, whether it meets Citizens Advice standards and how well the advice needs of the local community are being met
- monitoring the financial position and ensuring that the charity operates within its means and objects, and that there are clear lines of accountability for day-to-day financial management
- supporting the development of the charity through participation in agreed projects
- actively seeking to further the strategic objectives of the charity, and acting in its best interests at all times
- maintaining confidentiality about any sensitive or confidential information received in the course of duties as a trustee
- representing and supporting CAOx at fundraising and networking events as appropriate



# Person Specification

Personal skills and qualities:

- skills and experience to lead change within the organisation
- commitment and availability to attend trustee board meetings
- effective communication and influencing skills, willingness to participate actively in discussion and confidence to represent CAOx externally
- willingness to gain knowledge of local needs and resources
- commitment to the aims, principles and policies of the CA service, including those relating to equal opportunities, independence and social policy
- willingness and ability to act in the best interests of the charity
- ability to understand and accept their responsibilities and liabilities as trustees and employers
- willingness to participate in democratic process which develops CA policies by area and nationally
- numeracy to the extent required to understand CAOx accounts with the support of a treasurer
- willingness and ability to learn, and to develop and examine their own attitudes
- ability to think creatively and strategically, and exercise good, independent judgement
- ability to work effectively as a member of a team.

In particular, we would welcome applications from individuals who can bring skills and experience in one or more of the following areas:

- finance and accounting
- UK legal practice (not specifically Charity Law)
- marketing and communications

# How to Apply

Please apply by CV and covering letter, briefly outlining why you are interested in the role and how you feel you meet the person specification. Please also enclose a completed diversity monitoring form. Applications should be sent to:

[hr@caox.org.uk](mailto:hr@caox.org.uk)

Applications may also be made by post to:

Phil Baker

Chair, Trustee Board

Citizens Advice Oxfordshire, The Old Print House, Marlborough Lane, Witney  
OX28 6DY



Closing date for applications is **13 Feb 2026**.

## Selection Process

After the closing date, we will consider all applications and will invite a short list of people for an informal conversation with the Chair in late February, followed by an online interview during the week commencing 9 March.

Our aim is to have completed the process and made offers by the end of March 2026.

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**Citizens Advice Oxfordshire**  
**January 2026**