



# Trustee Recruitment

## Candidate Information Pack

Tax Help for Older People  
Unit 10, Pineapple Business Park, Salway Ash, Bridport, Dorset, DT6 5DB  
The charity which provides free tax advice to people in financial need  
and promotes public understanding of tax matters

## Chair's Letter

Thank you so much for your interest in joining our Board of trustees. We are proud of the work Tax Help does to help older people on low incomes when they get into difficulties with their tax. The charity's vision is to provide tax help for all of those who need it and we are looking for additional trustees to help us achieve that. We hope this pack encourages you to apply.

We really want to broaden the experience of the board and are looking for two trustees with skills and experience in the following:

- Fundraising and income generation
- Work focused on the needs of older people - our beneficiaries.

Our trustees have overall control of the charity and are responsible for making sure it is doing what it was set up to do. They are the people who lead the charity and decide how it is run.

The Board has a very strong, constructive relationship with the executive team, led by our dedicated and passionate CEO, Valerie Boggs. This is an opportunity to have real influence in a national organisation which is highly regarded in its field. You would be joining a friendly group of trustee colleagues and a very welcoming wider community.

Our clients come from diverse backgrounds. We are keen to reflect that in our board and so encourage applications from black, Asian and other ethnic minority groups, but also a broad age-range and people living with disabilities.

It is not necessary to have previous board experience as support will be provided. This position would therefore suit an individual taking their first steps to develop wider board level and governance experience.

Yours

A handwritten signature in black ink that reads "Penny Hamilton". The signature is written in a cursive, flowing style.

Penny Hamilton

## About Tax Help

Tax Help for Older People was founded in 2004 and supports and advises vulnerable older people on low incomes struggling with tax and pension issues. Our free, independent, expert advice and friendly, accessible service ensures that no vulnerable older person need fear the complexities of the tax system.

Our tax adviser team offer expert tax advice over the phone or by email. For clients whose tax issues are more complex or confusing we can offer face-to-face support with one of our trained volunteers at a local tax surgery or at the client's home. We are able to cover most parts of the UK with our 430 volunteers.

Our service includes help and guidance on all aspects of personal and pensions tax likely to affect those on low income. Each call and each caller is different. The tax advice and support we provide is specific to each individual, based on their situation and in a way that is clear and easy for them to understand. Our accessible approach is at the heart of what we do.

We also provide tax awareness and advice training to partner organisations who will benefit from our tax expertise, primarily the voluntary and community sector as well as companies working with vulnerable, older customers.

Website and social media links here:

[Tax Help website](#)



### Our sister charity

We work closely with our sister charity, TaxAid, who focus on supporting and advising vulnerable working-age taxpayers. While we serve different client groups with different problems, the two charities work together on areas of common interest and maximise efficiency by sharing functions such as finance, HR and fundraising.

This video shows how the two tax charities can change people's lives

<https://youtu.be/rdhbYdr8OnQ>

## The Board & the role of the trustees

### The Tax Help Board

Tax Help has a board of 7 committed and passionate trustees who work closely with the executive team.

Board meetings are held 4 times per year. During the pandemic, Board meetings have been virtual. Assuming more normal conditions, we intend to hold at least one physical meeting a year and possibly more. Travel expenses for physical board meetings will be reimbursed.

We encourage trustees to support the small executive team where appropriate between Board meetings. The associated time commitment is flexible.

### Role of the trustees

Our trustees have overall control of the charity and are responsible for making sure it is doing what it was set up to do.

Our trustees are the people who lead the charity and decide how it is run.

At Tax Help, we need our trustees to:

- Support, encourage, advise and challenge the management team
- Protect and improve the financial viability of the charity
- Contribute to the strategy, vision, aims and values
- Champion good governance and safeguard the good name and values of the charity
- Identify and evaluate key risks

For a more in depth view, the Charity Commission's [guidance](#) explains the key duties of all trustees and what trustees need to do to carry out these duties competently.

## Who we are looking for

The current board have similar backgrounds, with six being tax professionals and one having been an editor of tax publications.

We feel strongly that we need new trustees with different perspectives. We are looking for two trustees with skills and experience in the following:

- Fundraising and income generation
- Work focused on the needs of older people - our beneficiaries.

Tax Help's clients come from diverse backgrounds. We are keen to reflect that in our board and so encourage applications from black, Asian and other ethnic minority groups, but also a broad age-range and people living with disabilities.

It is not necessary to have previous board experience as support will be provided. This position would therefore suit an individual taking their first steps to develop wider board level and governance experience.

## The new trustee roles

### Fundraising trustee

In common with most charities, fundraising and income generation presents challenges.

The charity has a dedicated Fundraising Director but has no professional fundraising expertise on the board. We are looking for someone who can bring a fresh perspective to fundraising plans and strategy, support the charity's fundraisers and ensure fundraising is of the highest standard.

Tax Help receives more than 40% of its cash funding from HMRC and has a relatively small pool of committed, regular donors that it relies upon.

We would look to this trustee to:

- Support and encourage the Fundraising Director and others to ensure effective income generation is being achieved.
- Advise the board on fundraising strategy, including ideas on how to diversify the charity's income streams

- Provide constructive challenge to the management team about fundraising strategy and implementation
- Contribute knowledge of fundraising techniques and strategies

#### *Person specification*

We are looking for a fundraiser with experience of income generation amongst corporates, high-net worth individuals, trusts and foundations. In particular they should have:

- An understanding of the challenges facing charities in maximising income streams and donors
- Excellent networking skills, influencing and communication skills
- Good, independent judgement
- A willingness to speak their mind
- An ability to work effectively as a member of a team
- And a commitment to the cause.

#### **Beneficiary-focused trustee**

Tax Help exists to serve older people. 50% of those who contact us are over 75. Many struggle with bereavement in addition to the health, cognitive and social challenges of old age. Many are isolated and have no support network to turn to.

Our vision is to provide tax help for all of those who need it.

We would look to this trustee to:

- Support the board and the management team in developing their understanding of the communities that the charity exists to serve
- Advise the board and the management team on how best to communicate with the communities that the charity exists to serve, including how best to partner with other organisations
- Contribute knowledge of the sector to enhance the charity's future strategy

#### *Person specification*

We are looking for someone with experience of supporting older people in poverty. This is likely to be through working in the health or social care sectors, or charities in this field such as Age UK or Alzheimer's Society. In particular they should have:



- An understanding of the challenges facing charities in reaching and supporting older people in poverty
- Excellent networking skills, influencing and communication skills
- Good, independent judgement
- A willingness to speak their mind
- An ability to work effectively as a member of a team
- And a commitment to the cause.

### **Recruitment Process**

Applications will close on 31<sup>st</sup> May 2022.

The selection will include an interview with the Chair of Trustees and two other trustees. Interviews will take place during the week commencing 11 July for the fundraising trustee and week commencing 25 July for the beneficiary-focused trustee.

### **How to apply**

Please send your CV and a statement outlining how your skills, knowledge, experience and enthusiasm for our work might be able to strengthen our board of trustees.

Please send this by email to Rose Over at [rose.over@taxvol.org.uk](mailto:rose.over@taxvol.org.uk)

If you have any questions please contact Brian Chapman who is one of the current trustees, at [brian.chapman4@gmail.com](mailto:brian.chapman4@gmail.com).