

29th May 2023

Abbas & Templecombe Parish Council

Dear Councillors

Citizens Advice Somerset Merger Plans

We published a statement in January 2023 announcing that four of the Citizens Advice organisations in Somerset were exploring the option of merging. Over the subsequent months the Trustees of Citizens Advice Mendip, Taunton, Sedgemoor and South Somerset have worked together to complete a rigorous appraisal of the option to merge. We are pleased to advise you that having completed Due Diligence we have made the decision to merge and will do so by the 1st October 2023. From that date forward we will be known as Citizens Advice Somerset.

The merger is partly in response to the unification of four Somerset District Councils into a single Unitary Authority and will ensure that our services continue to align with those of the Local Authority. It is also felt that by coming together we will create a stronger and more sustainable foundation for advice services in Somerset. The new structure will ensure that we are best placed to respond to the ever increasing demand for our services and enable us to optimize our resources in support of the valued staff and volunteers working on the frontline.

Local services

We plan to continue to work within all of Somerset's Parishes and are fully committed to providing locally responsive services as is the case at present. By joining together we will be able to extend the benefits of our specialist provision and enhance the support offered in each locality.

Governance

In preparation for the merger we have established a Shadow Board with equal representation from each of the four merging Citizens Advice organisations. The Shadow Board is supported by our newly appointed Chair, Barry O'Leary, Angela Kerr CEO Designate and Amy Jones Deputy CEO Designate. Upon merger the Shadow Board will assume full governance control supported by Angela as the CEO of Citizens Advice Somerset and Amy as the Deputy CEO.

Message to our funders

Our funders and partners are highly valued stakeholders and we sincerely hope that you will support us through this transition. We fully intend to continue all the work programmes currently underway and will seek to secure agreement from each of our funders to transfer the funding arrangements into Citizens Advice Somerset.

Please be assured that our clients, staff and volunteers are at the heart of our planning. We are very busy putting everything in place to ensure that services are uninterrupted and that our teams are supported through the period of change.

As we begin the process of re-organising our operations we want to assure all our funders of our on-going commitment to delivering discrete local and/or specialist projects alongside the Somerset- wide general advice service.

Message to our partners

A mutually supportive working relationship with our partners and referral agents is a key cornerstone of our future plans. Our staff will continue to engage in local networks and the Citizens Advice Somerset website will be maintained as a source of information and a route into advice for clients and their referral agents.

Opportunities to Help Shape The Future of Citizens Advice in Somerset

During the autumn we will begin discussions with all our stakeholders as part of the process of refining our vision and setting our objectives for the next few years.

We are excited about the potential opportunities the merger will bring and in particular how it will enable us to provide more agile services in response to our communities' needs. We will keep all our stakeholders fully informed on our progress and hope that you will support us as we continue to work together in achieving our joint objectives.

If you would like to organise a meeting with us or have questions for the Shadow Board please contact us via Angela Kerr;
angela@citizensadviceSouthSomerset.org.uk

Yours faithfully



Angela Kerr
CEO Designate Citizens Advice Somerset

Barry O'Leary
Chair Shadow Board

On behalf of

Claire Hudson
Chair
CA Mendip

David Incoll
Chair
CA Taunton

Lyn Goodfellow
Chair
CA Sedgemoor

Lin Cousins
Chair
CA South Somerset

