

## **TRUSTEE RECRUITMENT – Application Pack**

Dear applicant

Thank you for your interest in the Board of Trustees of Citizens Advice South West Surrey (CASWS). Please find below information about the role of trustee at Citizens Advice South West Surrey together with details of the recruitment process. Please feel free to contact the Chair of Trustees, Paul Jarrett if you would like an informal discussion before applying. Contact details are set out below.

### **Citizens Advice South West Surrey**

Citizens Advice South West Surrey (CASWS) is an independent charity and limited company, operating in accordance with its membership of national Citizens Advice. Citizens Advice aims to provide the advice people need for the problems they face and improve the policies and practices that affect people's lives. We provide free, independent, confidential and impartial advice to everyone on their rights and responsibilities. We campaign for policy changes both locally and nationally. We value diversity, promote equality and challenge discrimination.

CASWS is a medium-sized local citizens advice with around 40 staff and 140 volunteers. In addition to our 'core service' of face-to-face and telephone advice, we operate projects run by specialist advisors including for clients with mental health requirements and Macmillan funded support. We also work closely with other neighbouring local citizens advice.

### **Trustee Role**

Our trustees play an important role in ensuring CASWS fulfils its objectives, operates within its means and complies both with Citizens Advice membership requirements and the law. Day-to-day running of the charity is delegated to the Chief Officer. The role of trustee may be summarised as:

- Setting overall direction and supporting the development of CASWS;
- Ensuring CASWS meets the needs of the local community and membership standards;
- Employing staff;
- Controlling finances;

- Earning and retaining respect of important and influential people and organisations in the community including funding bodies;
- Ensuring CASWS complies with relevant laws including in relation to charities law, company law, employment law, health & safety, safeguarding and data protection.

The role is both interesting and rewarding, and enables development of personal skills such as leadership, governance and strategic development. Prior trustee experience is not essential but an understanding of the role of a trustee is important. Further information is available from the Charities Commission or [here](#)

## Skills Required

All applicants must have:

- Good communication and inter-personal skills;
- Independent thinking skills;
- Strategic vision;
- Empathy and commitment to the aims and policies of CASWS;
- Ability to work as part of a team;
- Ability to understand accounts with support from a Treasurer;
- Understanding of the duties, responsibilities and liabilities of trustees and company directors;
- Availability to attend trustee board and other meetings. ( see time commitment below

In order to improve the collective skills set of the Board we would welcome candidates with skills in the following areas:

- Fundraising (and associated regulations)
- Safeguarding
- Property Management
- Legal
- Local Citizens Advice background
- IT including Digital Skills and Website Design
- Research & Campaigning
- Media/public relations
- Communications
- Good local network connections

Prior experience of Citizens Advice is not required but would be an advantage. A full induction and on-going training is provided as necessary.

## Time Commitment

The minimum time commitment is 6 Trustee Board meetings per annum, usually in the evening and around 2 hours in length plus preparation time for those meetings. Occasionally additional Board Meetings are required. Trustees are expected to attend the annual development day with CASWS staff and volunteers and an annual Trustee strategy day (each of which are up to a full day). Trustees are also encouraged to actively support CASWS fundraising events.

Trustees are required to take on a specific area of responsibility and/or sit on a sub-committee which will result in additional meetings and preparation time. The current sub-committees are HR, Governance and Compliance and Finance. All trustees are expected to attend the CASWS offices occasionally to meet staff and volunteers in order to gain an understanding of their work.

The role is unpaid although reasonable expenses will be reimbursed.

## **Equality and Diversity**

We are seeking to expand our existing Board with particular focus on improving skills and diversity across the Board. We welcome applications from candidates from all backgrounds regardless of age, disability, gender, religion, beliefs, ethnicity, marital status or sexual orientation. Our aim is for our Board to properly reflect the community that it represents. To that end, applications from women, and BAME candidates would be encouraged as these groups are currently under-represented on the Board.

## **Recruitment Process**

Once we have received your application, we will review it and contact you to arrange an interview if we believe your skills would be of benefit to the organisation. Following the interview, we will discuss any suitable trustee roles with you. Subject to satisfactory references, the successful applicant will be invited to meet members of the Board during and attend an initial board meeting.

If you require any further information before making your application please contact Paul Jarrett, Chair of Trustees at [paul.jarrett@casws.org.uk](mailto:paul.jarrett@casws.org.uk). We look forward to hearing from you.

Citizens Advice South West Surrey  
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