

# Chair Recruitment Pack



# Message from the Chair

## Paul Jarrett

Dear Candidate,

Thank you for your interest in becoming the new Chair of the Board of Citizens Advice South West Surrey (CASWS).

At Citizens Advice, we're proud to be the people's champion. Every day, we help individuals navigate challenges - whether that's debt, housing, benefits, employment, or something else - by providing free, confidential, and impartial advice. We also campaign for lasting policy change, both locally and nationally. Following the merger of two strong local Citizens Advice offices, **CASWS is in a great position for growth**, and we're excited about the opportunities ahead.

We support around **8,500 clients every year** across Guildford and Waverley through six locations as well as by phone and email. Though these areas are often considered affluent, many residents still face serious struggles due to rising living costs and unequal access to support. **We exist to help people face fewer problems in Guildford and Waverley.**

I have been Chair of CASWS for nearly five years and continue to be impressed by the dedication and commitment of our team of **38 staff, 147 volunteers and seven fellow trustees** to helping people find a way forward. As it now time for me to step down, we are looking for a new Chair who can bring **vision, leadership, and a passion for community service** to help us shape our future.

As Chair, you'll work closely with our Chief Officer and other trustees, offering strategic guidance and ensuring that we stay true to our purpose and values. This is more than a governance role; it's a chance to make a tangible impact.

We'd particularly welcome your experience if you have a background in:

- senior leadership;
- governance;
- finance; or
- working with local government or corporate funders.

Your insight could help us secure new funding sources and improve the way we serve our community.

We are also **committed to improving diversity and inclusion within our Board** and are especially keen to receive applications from women and individuals from underrepresented ethnic backgrounds.

We hope this pack provides useful information about our organisation, the Chair role and the application process and is a taster for what you can expect by becoming involved in the organisation.

Please contact me if you would like to have an informal chat about the role and we very much look forward to hearing from you.

**Paul Jarrett**  
**Chair of Trustees**  
[paul.jarrett@casws.org.uk](mailto:paul.jarrett@casws.org.uk)

# About Citizens Advice South West Surrey



CASWS is a **registered Charity and a Company Limited by Guarantee**. Members of the Board are both Charity Trustees and Company Directors.



We give independent, impartial, free and confidential information and advice to **help people overcome the problems they face**, such as benefits, debt, employment, housing, relationships and immigration.



We use our knowledge about our clients' problems to identify trends and campaign to **improve the policies and practices** that affect peoples' lives.



At CASWS Surrey we also have **specialist services** such as debt advice, benefit advice to people affected by cancer, support to people with mental health issues, advice for people who are at risk of homelessness and Advice First Aid.



At CASWS we have **over 150 trained volunteers and 38 paid staff** operating from our offices in Ash, Cranleigh, Farnham, Godalming, Guildford and Haslemere and each year they help around 8,500 people in a range of ways including face to face, over the phone, by email and web-chat.

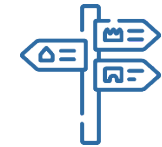
## 2024-5 key statistics



**8,475 people helped**



**Advised on 30,008 issues**



**Top 3 issues were benefits, housing and debt**



**50% clients were disabled/long term health**



**59% clients were female**



**13% clients were BAME**



**£346k debt written off**



**£5.76 million in income gain**



**571 evidence forms raised for campaigning**

**For more information about who we are and what we do check out [casws.org.uk](https://casws.org.uk)**



# About the role



## What will you do?

- Complete an induction for your role.
- Maintain an awareness of how CASWS is operating.
- Plan and chair the AGM and board meetings, working with the Executive Assistant and Chief Officer.
- Read papers for board meetings and attend a minimum of four board meetings and one AGM a year. Additional meetings of the board will typically take place throughout the year.
- Ensure that decisions and actions agreed at board meetings are within our governing documents and are carried out,
- Liaise with our Relationship Manager to keep informed of developments within Citizens Advice that may impact CASWS.
- Meet with Chairs of other local Citizens Advice to share ideas and explore opportunities to work collaboratively.
- Manage trustee performance including attendance, contribution and training and development.
- Recruit and induct a trustee board with a diverse range of skills, experience and knowledge, promoting trusteeship to groups currently underrepresented. This includes key positions like Chair and Treasurer.
- Sit on one or more of the sub committees that support the board (currently finance, governance, HR, funding and remuneration).
- Provide support and supervision to the Chief Officer including an annual appraisal.
- Coordinate and develop the annual trustee report and strategic business plan, working with the board and Chief Officer.
- Ensure proper management and control of CASWS finances, working with the Treasurer.
- Represent CASWS alongside the Chief Officer, with funders and potential funding at local events.

- Utilise any local contacts and relationships to promote CASWS.
- Work together with all trustees to ensure that the board is able to:
  - set policy and strategy direction, set targets and evaluate the performance of CASWS;
  - monitor the financial position of CASWS ensuring that it operates within its means and objectives and that there are clear lines of accountability for day-to-day financial management;
  - monitor whether the CASWS service complies with its governing document and meets the required standards;
  - monitor that CASWS operates within its agreed Fundamentals and its Purpose of existing to help people face fewer problems in Guildford and Waverley;
  - seek the views of all sections of the community and monitor how well the service meets the needs of the local community;
  - ensure that the service plans for the recruitment and turnover of staff and volunteers;
  - review its own work and how effectively it operates including action for improvement; and
  - work on specific projects to further the strategic objectives of CASWS.



## What's in it for you?

- **Apply your management and leadership skills and experience** to lead and develop a charity providing a critical service to people.
- **Make a positive impact for people in your local area** by ensuring we are sustainable and meet the needs of the community.
- **Be part of Citizens Advice** a national charity with a proud history that provides help to millions of people every year. **Build on your skills** and gain more governance, leadership and strategy experience
- We also reimburse reasonable, out of pocket expenses.



## What do you need to have?

### You don't need specific qualifications, but you'll need to:

- understand or develop an understanding of the type of work we do;
- understand and accept the responsibilities and liabilities as a trustee;
- be non-judgmental and respect views, values and cultures that are different to your own;
- have strong leadership skills and the ability to facilitate meetings;
- have excellent interpersonal skills;
- have good listening, verbal and written communication skills;
- have good numeracy skills to understand the accounts, with the support of the Treasurer;
- be able to exercise good independent judgement;
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection; and
- be willing to undertake training in your role.



## How much time do you need to give?

Trustee boards usually meet in the afternoons and occasionally in the evenings.

You'll likely need to give approximately **two days a month** as you may need to attend other meetings if you're involved in specific projects. There are also regular volunteer and staff meetings which the board are encouraged to attend.



# Valuing inclusion

Our volunteers come from **a range of backgrounds** and we particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black Asian Minority Ethnic (BAME) communities.

**If you are interested in becoming a trustee and would like to discuss flexibility around location, time, 'what you will do' and how we can support you please contact us.**



## How to get involved

Complete the short application & diversity monitoring form, which you can [download here](#)

We'll invite you for an informal interview to discuss the role. This is a chance for you to find out more about the role, and CASWS and decide if you'd like to volunteer with us. It's also a chance for us to find out more about you and to see if the role is a good fit for you.

The rest of this pack contains more information about being a volunteer at CASWS.

## Ex-offenders

**Citizens Advice have an ex-offenders policy to ensure that ex-offenders are treated fairly.**

Having a criminal record is **not** in itself a barrier, and we will only take relevant convictions or sexual offences into account. We consider each offence individually, looking at issues like risk to staff and clients, how long ago it took place, the circumstances and whether they are relevant to the volunteer role. Some roles may require DBS checks.

Anyone with a caution or conviction for a sexual offence against a child or vulnerable adult is considered unsuitable to volunteer.

We will ask about unspent convictions as part of the application process. If you're concerned or would like to discuss your individual circumstances further, please contact us.

## Entitlement to work or volunteer

If you are from outside the EU / EEA, it's important you check you are permitted to volunteer as a Trustee or carry out 'unpaid work' in addition to your main reason for entering the country, to avoid jeopardising your visa status.

If you cannot find the answer clearly on your immigration documentation, contact the [UK Border Agency](#)

# How we will process your data

## How we will use your information before you join us

The information you give us during the recruitment process will be used to help us progress your interest or application in becoming a volunteer. This is our 'legitimate interest' under data protection law. Our legal basis for collection of special category data, including information about criminal convictions is consent.

Your information will only be seen by the people involved in the recruitment process, and will be stored securely. We will keep unsuccessful application information for 12 months.

We share your data with third parties in order to obtain references. If we need to share your data for background checks from third-party providers or criminal records checks from the Disclosure and Barring Service we will tell you, however there are currently no volunteer roles that require these checks.

## How we will use your information when you're a volunteer

If you are recruited as a volunteer, the information you give us will be used to help us support you with your volunteering role. This is our 'legitimate interest' under data protection law. This includes your application to volunteer with us, references, any other checks we have carried out, and other files that make up the volunteer record. Our legal basis for collection of special category data, including information about criminal convictions is consent.

All volunteer information will be kept securely, and it will only be used by appropriate people involved in supporting and managing volunteers, or dealing with issues such as complaints or problems related to volunteers. Some examples of how we do this include:

- using your email address to communicate with you about volunteering, for example, the update emails;
- using your next of kin details if you were involved in an emergency situation or we were concerned for your safety;

- recording information about your volunteering role, for example, training records and appraisals;
- helping us to address and resolve any problems or complaints;
- using the bank details you provide to pay your expenses;
- recording feedback about your volunteer experience, for example, the People Survey;
- providing statistical information to Citizens Advice or our funders, for example, anonymous demographic information;
- using secure electronic systems to hold your information, for example, SharePoint and PeopleHR; and
- using your name and email address to keep in contact after you have stopped volunteering (unless you tell us otherwise).

The Citizens Advice service is a network of independent local Citizens Advice charities which we are part of, and of which National Citizens Advice is the membership body. National Citizens Advice will use your data in conjunction with data from other platforms, such as those that deliver digital and telephone advice (currently Connect). This will help us to measure the impact of volunteering, as well as to identify areas of improvements. When used by national Citizens Advice, this information will be anonymised and aggregated so that individuals are not identified.

## How we will protect your data

We take the security of your data seriously and have internal policies and controls in place to try to ensure that your data is not lost, accidentally destroyed, misused or disclosed, and is not accessed except by its employees, volunteers or trustees in the performance of their duties. We will not transfer your data to countries outside the European Economic Area.

## Your rights

You have legal rights over your data, including access to it, and the right to ask that it is corrected, restricted or deleted. There is more information on these rights on the Information Commissioner's Office website: [www.ico.org.uk](http://www.ico.org.uk).





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