

# Citizens Advice LeicesterShire

## Trustee Application Pack

### August 2022

#### Message from the Chief Executive, Richard Evans



Thank you for your interest in becoming a trustee at Citizens Advice LeicesterShire (CitAL).

Being a trustee is rewarding, challenging and educational. As a trustee, you play an important role in the development of CitAL, working closely with myself and members of the Central Management team to deliver an excellent service to clients across Leicester and Leicestershire.

We are looking to bring on board trustees who have a passion for helping local communities and to enable us to widen our expertise and knowledge within the trustee board. In particular, if you have a background in HR, local health or mental health services, Equality Diversity and Inclusion (EDI) tendering and/or commissioning or accountancy then we would be delighted to hear from you.

We want our board to not only reflect the diversity in our staff and volunteers but also the communities we serve and therefore welcome applicants of all ages, ethnicities, identities and backgrounds.

**Richard Evans**

A handwritten signature in black ink that reads 'R Evans'.

# About us Citizens Advice LeicesterShire

## We are in the City and County

We have a number of teams that offer advice to clients in Leicester City, Blaby, Harborough, Hinckley & Bosworth, North West Leicestershire and Melton. We provide generalist advice on a wide range of issues including benefits, debt, housing, employment, relationships and family, immigration, discrimination and community care issues.

## We offer specialist services

We offer a number of specialist services including:



Our debt teams Money Advice and Money Max that work with clients with money planning and processes such as bankruptcy and debt relief orders.



A Help-to-Claim service that deals specifically with supporting new universal credit claimants through to their first payment.



Pension Wise that offers advice to over 50's on what pension options are available to them.



Our health advice services include Mesothelioma, Macmillan and most recently, our East Midlands Sickle Cell and Thalassaemia (EMSTN) advice service. All of these services provide benefit advice and support, including appealing and challenging decisions.

## Supporting people in our local community

Our advice services are free, independent, impartial and confidential. We are here to help and support everyone and will listen without judgement.

# Trustee testimonials

## **The Chair of Trustees and the experience and qualities needed**

I've used this as a heading as I needed a start point in trying to work out what is required for this role. There is not an easy answer to this question as I have been personally involved in the evolution of what has become Leicestershire CAB for a number of years. Others will have made different but just as significant journeys. My start point will be working as a paid Money Advice and Welfare Rights worker in North West Leicestershire in the 80s. I was personally involved in helping families and individuals who were trapped in debt and poverty. Their life choices were limited. Whole communities were affected by the closure of the Coal Mining industry.

Another part of my role at this time was to help develop new initiatives by applying for funding. We developed a successful Outreach project, taking our support out to the isolated parts of the district.

In 1996, I established a new voluntary sector Council for Voluntary Service (CVS) in Blaby District.

Again, there was an opportunity to establish new initiatives and organisations. I also have become involved with the University of Leicester. They were interested in setting up a Foundation degree programme for managing in the voluntary sector (Foundation degree in Managing Voluntary and Community Sector MVCO). I became programme Director. This is where my involvement with the CAB movement really starts.

I became chair of the newly established South Leicestershire CAB. One of my first Graduates, Charlie Gibbons became CEO. The story moves on fairly rapidly from here. Like-minded colleagues across the county shared (there were and still are some dissenters) a belief that we should all come together to form a new entity that covered the City and County. Much of

that has now been achieved. LeicesterShire CAB is a dynamic and evolving organisation. It is able to change to meet the needs of its funding bodies and individuals who face injustice and hardship. My journey has been shared by Richard Evans CEO and other trustees, staff and volunteers. We do work as an incredible team.

So, if I go back to the original question. I still work in Higher education (but not for much longer). I work as a Specialist Study Skills tutor supporting Autistic students on their challenging journey through university and beyond. My passion is to help individuals on their life journeys. We should always fight injustice. My specialism in HE is the management and governance of the voluntary sector. This is my skill and experience package that enables me to meet the challenges of Chairing this fantastic organisation.

**Malcolm Flaherty**  
**Chair of Trustees**  
**Citizens Advice LeicesterShire**

*M.T. Flaherty*

# How Citizens Advice LeicesterShire works

## Our people

CitAL has a trustee board of up to 12 people who are all volunteers. Trustees bring a wide range of professional skills, knowledge and local insight to the governance and development of our network of vital community advice services. The trustees, in conjunction with the CEO, are responsible for setting CitAL's overall strategy and budget. Day to day running and further development of the organisation is the responsibility of the CEO who, alongside the central management team, oversees the delivery of our services.

CitAL has 55 paid staff and over 60 volunteers working in various roles including assessors, advisers, supervisors, research and campaigns and more.

## The impact we have

In 2021-22, we helped 26,725 clients with 55,693 issues, 40% of these being in relation to welfare benefits and 13% regarding a debt issue. We answered 35,529 telephone calls and there were 392,269 visits to online advice.



## **Our clients**

Our clients come to us from all walks of life and we see a diverse range due to the wide area that we cover across the City and County. Between 2021-22, 59% of our clients were female, 56% were disabled or had a long term health condition and 29% were Asian, Black or of another ethnic heritage.

## **Our research & campaigns**

The information provided to us by the clients we see, provides us with a unique insight into the problems faced by people living in Leicester and Leicestershire. We are able to spot developing trends and this helps us to develop services, create campaigns and speak up for our clients.

## **Valuing diversity**

The Citizens Advice service is committed to valuing diversity and promoting equality. We encourage and welcome applications from suitably qualified candidates from all backgrounds regardless of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation.

## **Our website**

Please visit our website for further information about the services we offer: [www.citizensadviceleicestershire.org](http://www.citizensadviceleicestershire.org)



## Trustee role description

Our trustees are required to attend a minimum of 7 meetings per annum, including the AGM and sub groups that meet to discuss specific issues. As a trustee you will:

- set policy and strategy direction, and evaluate the performance of CitAL
- monitor the financial position of CitAL ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management
- monitor how well the service meets the needs of local people
- ensure that CitAL remains an attractive place to work and volunteer
- review its own work and how effectively it operates including action for improvement
- Help raise the profile of CitAL among local networks and communities

### **As a trustee, you may be asked to:**

- maintain an awareness of how CitAL is operating
- read papers for board meetings and attend at least 7 board meetings per year
- work on specific projects with other trustees or staff within CitAL to further the strategic objectives of the organisation
- actively partake in discussions during board meetings

### **The many benefits of becoming a trustee with CitAL include:**

- providing you with the experience and knowledge that you can put on your CV to develop your career
- making a positive impact for people in your local area by ensuring CitAL is sustainable and meeting the needs of the community
- meeting people and build relationships with trustees, staff and other volunteers
- building on your governance, leadership and strategy skills
- we will reimburse your expenses

## Person Specification

| Essential Criteria |  | Measured at                         |                                     |
|--------------------|--|-------------------------------------|-------------------------------------|
|                    |  | Application                         | Interview                           |
| 1.                 | Understand and accept the responsibilities and liabilities as trustees   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 2.                 | Be non-judgmental and respect views, values and cultures that are different to your own                                  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3.                 | Have good listening, verbal and written communication skills   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 4.                 | Be able to exercise good independent judgement   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 5.                 | Have good numeracy skills to understand accounts with the support of the treasurer                                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 6.                 | Be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and be | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |



|    |   |                                     |                                     |
|----|---|-------------------------------------|-------------------------------------|
|    | willing to complete annual GDPR training  |                                     |                                     |
| 7. | <p>Knowledge and/or experience in one or more of the following areas:</p> <ul style="list-style-type: none"> <li>● HR</li> <li>● Health Services</li> <li>● Mental Health</li> <li>● Equity Diversity and Inclusion (EDI)</li> <li>● Tendering and/or commissioning</li> <li>● Accountancy</li> <li>● IT</li> <li>● Specialist advice</li> <li>● Social Policy</li> </ul> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

If you are interested in this role, please contact [adele.stacey@citizensadviceleicestershire.org](mailto:adele.stacey@citizensadviceleicestershire.org) to discuss further.