

Could YOU be our next Trustee?



Passion for our purpose & values



Professional skills or Lived Experience



Driven to make a difference



LeicesterShire

**Sharing knowledge to transform lives.
We Listen, We Act, We Empower.**

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Welcome



“Being a Trustee is a fantastic way to give something back to the Community and to a cause that I passionately care about. I am playing an integral part in the way the charity is run, ensuring it remains sustainable and financially viable. The help a Trustee provides is invaluable. Also, getting involved as a charity Trustee is a great way to put your professional skills and experience to use, it can be a great opportunity to learn new things too. You’ll get great insight into what’s involved in the management of charities and gain skills on working well within a leadership role to make changes.”

Narendra KLB Waghela

“Being a trustee for Citizens Advice allows me the opportunity to use my skills to the benefit of others.”

John Walters

Introduction from our chair

Dear Candidate,

Thank you for taking the next step and for looking into joining the Board of Trustees at Citizens Advice LeicesterShire. We believe that knowledge empowers people to make informed decisions, gives freedom of choice and builds resilience. I hope you will feel motivated to join us in this commitment.

We are a local charity, funded by local contracts and donations, with accreditation from the national network. As a volunteer trustee, you will play a critical role in directly supporting Citizens Advice across LeicesterShire, as well as working in collaboration with other areas in England and Wales, to help create a fairer society.

Citizens Advice LeicesterShire offers vital advice and information to people from all backgrounds. Highly committed advisers, including many volunteers, provide face-to-face consultations, online chats, and telephone advice. Together we helped nearly 31,000 local people last year (2024/25), with many making financial gains. Please do look at the 'how we help' section for more detail.

All the trustees are committed to looking for new opportunities to use and build on the expertise the organisation currently has. I hope that you will join us at this exciting time for our organisation as we work towards greater sustainability and service development in line with our new strategic approach.

Please do read this information pack to help you decide if a trustee role with us is right for you. If you decide to apply, I look forward to hearing from you and discovering what you can bring to this role.



Marie-Anne Beere

Chairperson of Trustees

About Citizens Advice LeicesterShire

Our Purpose

**Sharing knowledge to transform lives.
We Listen, We Act, We Empower.**

Our values



We Care



We Help



We Excel



We challenge

The Citizens Advice service is made up of Citizens Advice – the national charity – and an independent network of 283 local Citizens Advice members, of which we are one.

Three things you should know about us

1.

We're local and we're national. There are 6 national offices that offer direct support to people in 283 independent local Citizens Advice services across England and Wales.

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2.

We're here for everyone. Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.

.....

3.

We're listened to – and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

We are in the City and County

We have various 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 numerous specialist services across Leicestershire including:

- Our debt team, Money Advice Service, works 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 Macmillan and 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

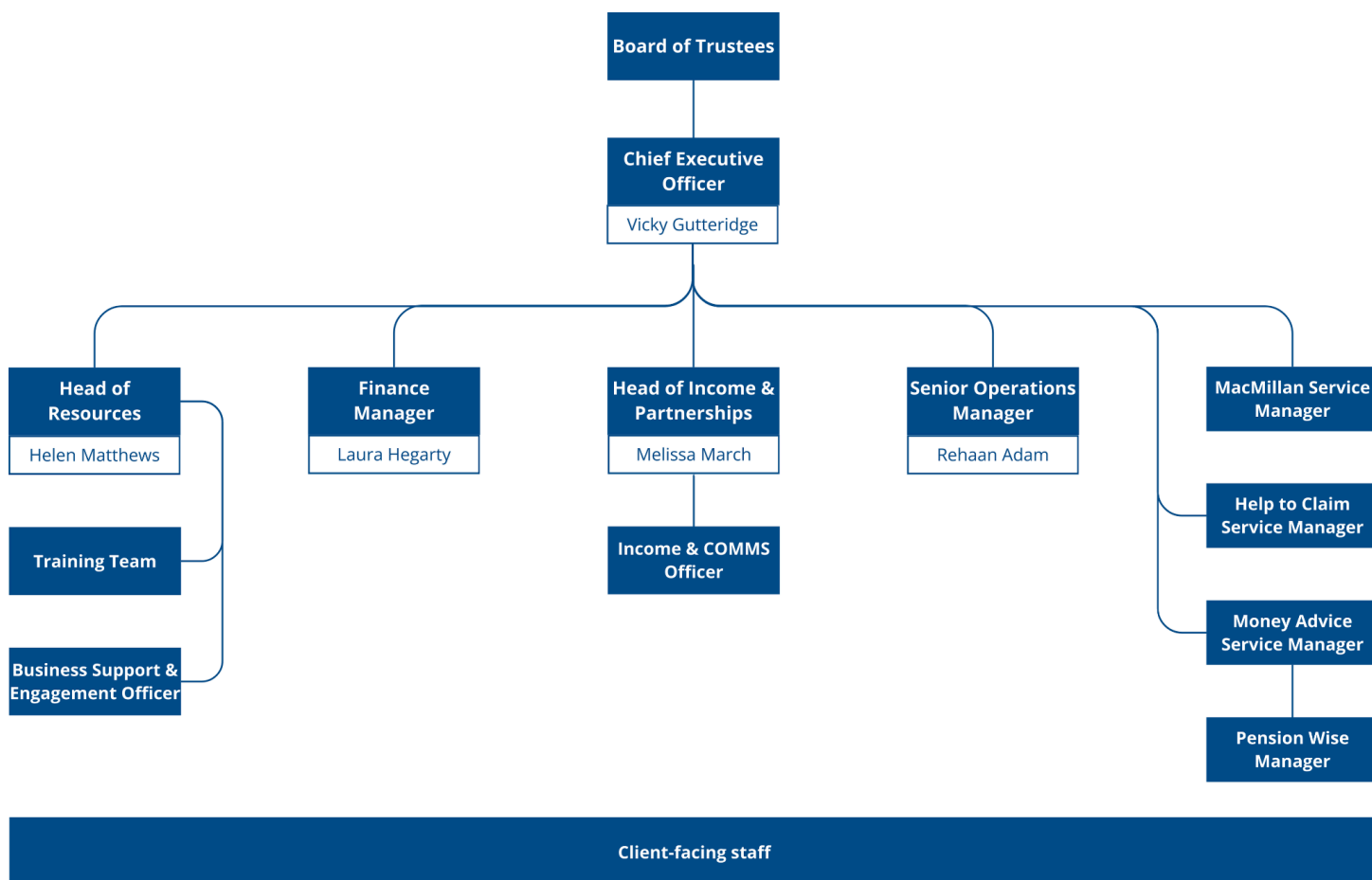
Our advice services are free, independent, impartial and confidential. We are here to help and support everyone and will listen without judgement.

How our organisation works

Our people and structure

Citizens Advice LeicesterShire 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 our overall strategy and budget. Day to day running and further development of the organisation is the responsibility of the CEO who, alongside the senior leadership team, oversees the delivery of our services.

Citizens Advice LeicesterShire has around 65 paid staff and over 60 volunteers working in various roles including assessors, advisers, supervisors, research and campaigns and more. Our turnover for 2024/25 was £1.7m. Our recent audited accounts can be found on our charity commission profile and a link to our audited accounts can be found on page 15.



How we help

Our clients and impact

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.



Our research and 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.

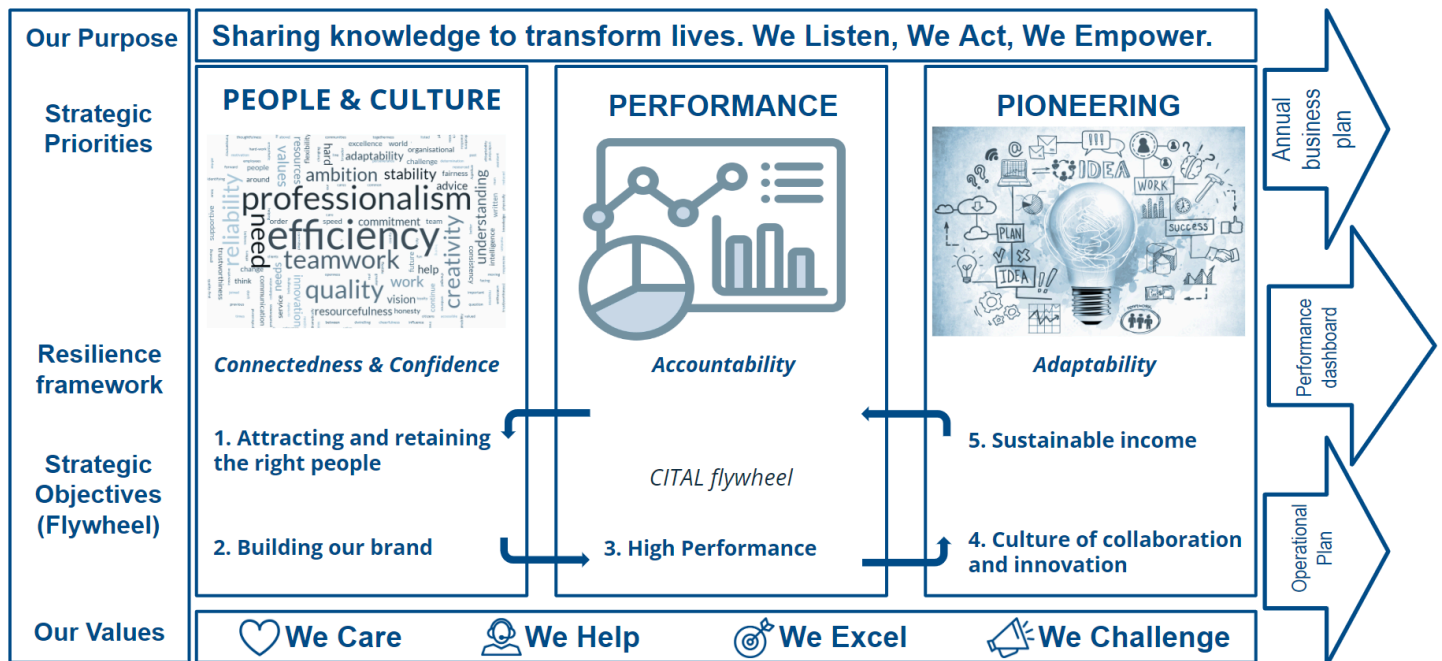
About the Trustee Role

What will you do?

- complete an induction for your role
- maintain an awareness of how the local Citizens Advice is operating
- read papers for board meetings and attend 6 board meetings per year
- work on specific projects with other trustees or staff within the local Citizens Advice to further the strategic objectives of the local Citizens Advice
- take an active discussion during board meetings and work with other trustees to:
 - set policy and strategic direction, set targets and evaluate the performance of the local Citizens Advice
 - ensure that all the finances and supporting financial control systems of the local Citizens Advice are in order including that full financial records are kept for all transactions, that money is only spent for the purpose given, and that proper financial controls are in place to safeguard the organisation's resources
 - monitor the overall health of the organisation ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day-to-day financial management decision making.
 - 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 are in place, reviewed and updated
 - monitor recruitment, performance and turnover of staff and volunteers
 - review performance benchmarks and how effectively we operate including action for improvement

Areas of focus

Strategy on a page: "Unite - Transform - Inspire"



Our five year strategy has 3 strategic priorities

1. People and Culture
2. Performance
3. Pioneering

Active focus groups for trustee involvement*

Focus group topic	Supporting Knowledge, Skills & Experience
Reward and Recognition group	• Human resource / people management • Wellbeing & Inclusion strategies • Organisational design • Compensation strategy / pay structures
Strategic Finance, Performance and Governance	• Financial planning and analysis • Risk Management and governance • Data Ethics (AI)
Strategic Communications and Networks	• Compelling storytelling • PR and Media • Strategic marketing • Professional networks

Future focus groups for trustee involvement*

Focus group topic	Supporting Knowledge, Skills & Experience
Innovation group	• Regulatory Standards for Social Housing and Private Landlords • Policy development and training • Mediation practice • Change Theory / Business Strategy • Data Analysis and Interpretation • Business / Social Enterprise strategy • Project Management • Technology and Artificial Intelligence
Equality, diversity and inclusion	• Legal frameworks • Policy development and training • Co-production work • People management / Culture development
Learning and Development	• Instructional design • Needs analysis • Learning management systems • Training delivery • Coaching & Mentoring

**Skills and experience in any of these areas will be valuable and help to deliver our vision.*

What do you need to have?

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

- understand and accept the responsibilities and liabilities as trustees
- be non-judgmental and respect views, values and cultures that are different to your own
- have good listening, verbal and written communication skills
- be able to exercise good independent judgement
- have good numeracy skills to understand accounts with the support of the treasurer
- Be confident with IT and cloud sharing systems (Google Drive)
- be willing to learn about and follow the Citizens Advice aims, principles and policies, including Equality, diversity and inclusion, confidentiality and data protection
- be willing to undertake training in your role

How much time do you need to give?

Trustee boards usually meet in the evenings, every two months for approximately 2.5 hours. You will need additional time to prepare for the meetings and read board papers. You may need to attend other meetings if you're involved in specific projects, and we hold an annual away day each year. We encourage our volunteers to meet with volunteers and staff occasionally within the local Citizens Advice.

We can be flexible about the time spent and how often you volunteer so come and talk to us.

What's in it for you?

- make a positive impact for people in your local area by ensuring the local Citizens Advice is sustainable and meeting the needs of the community
- meet people and build relationships with trustees, staff and other volunteers
- build on your governance, leadership and strategy skills
- Invest in your professional development
- increase your employability

And we'll reimburse expenses too.

Valuing inclusion

We promote equality, diversity and inclusion in everything that we do. It is important that we attract staff and volunteers that represent the diverse communities we serve.

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.

We believe lived experience is as valuable as professional skills. Although very useful, it does not matter if you have trustee or senior leadership experience. What matters is that you are passionate about our purpose, share our values and are committed to your own personal development and making a difference.

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.

Person Specification

Personal skills and qualities for all trustees

Each individual member of the trustee board brings skills and qualities to the board. They add to the collective knowledge and experience by providing:

- passion about our purpose
- commitment sharing and upholding our values
- commitment and availability to attend trustee board meetings
- effective communication skills and willingness to participate actively in discussion
- willingness to gain knowledge of local needs and resources
- commitment to the aims, principles and policies of the Citizens Advice service, including those relating to equal opportunities, independence, and research and campaigns
- willingness and ability to act in the best interests of Citizens Advice LeicesterShire
- ability to understand and accept their responsibilities and liabilities as trustees and employers
- willingness to participate in democratic process which develops Citizens Advice policies by area and nationally
- numeracy to the extent required to understand accounts with the support of a treasurer
- confidence with IT to the extent required to use email, attend online meetings, access and contribute to google drive documents.
- willingness and ability to learn, develop and examine their own attitudes and leadership skills
- ability to think creatively and strategically, and exercise good, independent judgement
- ability to work effectively as a member of a team.

How to apply

Application Form

Please complete the online application form on our [website](https://citizensadviceleicestershire.org/join/trustee)¹.

Please note the online form will not 'save' your answers. We recommend preparing your replies separately, then copy and paste into the relevant box on the form before submitting your application. You can find the application questions below.

There is also an option to upload a recent copy of your CV (PDF Word doc etc.) but this is not a requirement.

As well as your contact information we ask the following questions:

1. Tell us why you are interested in becoming a trustee?
2. Describe any skills and experiences you have that would be useful for the role?
3. Tell us more about what you have done over the past few years that could support this role. For example, employment, work experience, volunteering, community activity (involvement in tenant groups, school activities, support groups), caring for children, other relatives or friends, classes, training courses etc.
4. Why do you want to volunteer for Citizens Advice? What do you hope to get from the experience?
5. What do you think are some of the main problems facing your community?
6. Please describe your availability in general terms during daytime and evening.
7. Are there any times that you're unlikely to be available e.g. school holidays?
8. Is there anything else you would like to say about yourself?
9. Are there any adjustments we can make to assist you in your application and/or interview? (This information will be treated as confidential)
10. Is there any equipment or support that we can provide to help you carry out the Trustee volunteer role itself? (This information will be treated as confidential).

¹ <https://citizensadviceleicestershire.org/join/trustee>

Please be assured that we will be supportive in discussing any adjustments with you at any stage of the recruitment process.

References

If we proceed with your application, we will ask for two references from people who know you in a work related, academic or professional capacity.

For further information or an informal discussion about the Trustee role, please contact:

Name: Vicky Gutteridge

Position: CEO

E: vicky.gutteridge@citizensadviceleicestershire.org

T: 07944 328831

Useful Information

[About us](#)²

[Our Living Strategy](#)³

[Audited Accounts](#)⁴

[Becoming a trustee](#)⁵

²<https://citizensadviceleicestershire.org/about/>

³<https://citizensadviceleicestershire.org/wp-content/uploads/2024/07/Citizens-Advice-LeicesterShire-Strategy-2024-2029-FINAL.pdf>

⁴<https://register-of-charities.charitycommission.gov.uk/charity-search/-/charity-details/5008562/accounts-and-annual-returns>

⁵<https://beingacharitytrustee.campaign.gov.uk/>

Citizens Advice helps people find a way forward

We provide accessible, confidential and independent advice to help people overcome their problems. We are a voice for our clients and consumers on the issues that matter to them.

We value diversity, champion equality and challenge discrimination.

We're here for everyone.

Citizens Advice LeicesterShire
Clarence House
Humberstone Gate
Leicester
LE1 3PJ



www.citizensadviceleicestershire.org

Citizens Advice LeicesterShire is an operating name of
LeicesterShire Citizens Advice Bureau.
Registered charity number 1135081. Company Limited by guarantee.

**citizens
advice**

LeicesterShire

**Sharing knowledge to transform lives.
We Listen, We Act, We Empower.**

We Care We Help We Excel We Challenge