



Becoming a Trustee

Thank you for your interest in becoming a Trustee with Citizens Advice Cheshire West. This information pack should provide you with useful and important information about our organization and what it means to be one of our Trustees.

Citizens Advice Cheshire West Aims

- **To ensure the right advice for everyone**, ensuring people do not suffer because they do not understand their rights and responsibilities, or because they are unable to express their needs effectively.
- **To improve the policies and practices that affect people's lives** by campaigning about issues that affect our clients and influencing decision-makers locally and nationally.

Our vision - The right advice for everyone

Our values - Respectful Helpful Effective



What skills/experience do you need to have?

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

- Understand and accept the responsibilities and liabilities of being a trustee.
- Be non-judgmental and respect views, values and cultures that are different from 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 willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection.
- Be willing to undertake training for your role.



What's in it for you?

- Make a positive impact for local people by ensuring Citizens Advice Cheshire West is sustainable and able to meet the needs of the community.
- Build relationships with staff, volunteers and other trustees.
- Build on your governance, leadership and strategy skills.
- Increase your employability.

And we'll reimburse expenses too.

Citizens Advice Service

The Citizens Advice service is made up of national Citizens Advice and a network of around 290 local Citizens Advice members.

The Citizens Advice service is based on four principles:

- **Independent** - We will always act in the interests of our clients, without influence from outside bodies
- **Impartial** - We don't judge our clients or make assumptions about them. Our service is open to everyone and we treat everyone equally.
- **Confidential** - We won't pass anything on what a client tells us, or even the fact they have visited, without permission.
- **Free** - No client has to pay for any part of the service we provide.

We **help resolve people's problems** by accessing a large electronic information system to ensure our clients are given accurate, up-to-date information on their rights and responsibilities. We also aim to **change policies and practices that affect our clients**, and we call this **Research and Campaigns**.



What does Citizens Advice Cheshire West do?

Citizens Advice Cheshire West provides general and specialist legal help to everyone in the Cheshire West area.



We give advice to **help people overcome the problems they face**, in areas 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 people's lives.



We have **specialist services** including money advice, welfare rights, and mental health advocacy.



Our local service has over **80 trained volunteers and paid staff**. We deal with over **15,000 clients each year**, via face to face interviews, over the telephone and through email & webchat.

Our aim is to provide “**impartial advice to everyone on their rights and responsibilities**”, irrespective of who they are and what background they are from. We encourage all staff and volunteers to **welcome diversity**, to respect the individuality of each person and value their contributions.

Everyone that uses or needs our service needs to know that we are **free, impartial, confidential and independent**. We want people to feel comfortable using our service, know that they can get advice when they need it and receive a good service that meets their needs.



What does a trustee have to do?

- Complete an induction.
- Gain and maintain an awareness of how Citizens Advice Cheshire West operates.
- Read papers for Board meetings and attend 7 meetings per year.
- Be willing to work on projects with other trustees and/or paid staff.
- Attend 1 Trustee Development Day per year.
- Take an active discussion during board meetings and work with other trustees to:
 - set policy and strategy direction, set targets and evaluate the performance of Citizens Advice Cheshire West;
 - Make a positive impact for local people by ensuring Citizens Advice Cheshire West is sustainable and able to meet the needs of the community;
 - Build relationships with staff, volunteers and other trustees;
 - 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; and
 - review its own work and how effectively it operates including action for improvement.
 - monitor the financial position ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management;
 - ensure that all the finances and supporting financial control systems 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;



How much time do you need to give?

- There are 7 two-hour Trustee Board meetings per year, usually held between 5pm and 7pm.
- 1 day per year to attend a Trustee Board Development Day.
- Trustees may be asked to attend additional meetings from time to time, including during office hours.



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 and how we can support you, please contact us.



Contact details

If you would like to discuss the role further please contact Nicki Berg, Head of People:

By email: nicola.berg@citizensadvicecw.org.uk

By phone: 01606 668925



To apply

The closing date for applications is **20th August 2023** and interviews will be held week commencing **4th September 2023**.

To apply, please submit your answers to the following questions on a word document and send to nicola.berg@citizensadvicecw.org.uk along with your contact details.

- **Why do you want to help the people in your community?**
- **What do you think are the main issues people in Cheshire West are facing/dealing with?**
- **What experience, skills or attributes would you bring to our Trustee Board?**
- **What would you like to get out of being a board member?**