



Roger Moore, Chair

Dear Candidate,
Thank you for your interest in becoming a Trustee on the Board of Citizens Advice Calderdale.

I have been a trustee of Citizens Advice Calderdale since 2015 and I am continually impressed by the dedication and passion our volunteers and paid staff have for helping people to find a way forward with the problems they face.

Each year we help over 6,000 local people, on a range of different issues. We offer a range of specialist advice and support services, such as welfare benefits, debt, energy, employment, housing, and consumer, for everyone in Calderdale.

The role of the Trustees is to ensure that the organisation lives within its means and plans for the future. It is sometimes challenging, but always rewarding, to be part of an organisation which helps and advocates for some of the most disadvantaged members of our community.

With the current Cost of Living crisis, the work we do has never been more needed. Demand from the public is increasing, whilst we continue to operate in a very challenging financial environment.

To ensure that we help as many people as possible, we have become:

- More innovative and flexible in our approach,
- More accessible to people who need our help,
- More effective in harnessing the talents of local people interested in joining our team, and
- More vociferous in our advocacy.

In support of this my fellow Trustees and I wish to appoint new Trustees with any of the following experience or skill sets:

- A connection with Calderdale
- Lived experiences of the types of issues affecting our clients
- HR/Personnel
- Partnership working within Public Health/NHS/Local Authority

- Marketing and Communications
- Legal knowledge

Experience of working with boards or committees is not essential, as we offer support and training.

We are committed to increasing the diversity of our Board and would encourage 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, then please get in touch at districtoffice@calderdalecab.org.uk to arrange a chat.

Or complete the application form attached.

The role of a Trustee

What will you do?

- Meet with us to discuss your new role.
- Read papers for board meetings and attend meetings
- Take an active part in discussions during board meetings and work with other trustees to:
 - o Set policy and strategy direction, set targets and evaluate performance
 - o Monitor our financial position ensuring that we operate within our means and objectives, and have proper financial control systems in place to safeguard the organisation's resources
 - o Ensure that the service plans for the recruitment and turnover of staff and volunteers

What's in it for you?

- **Make a positive impact for people in your local area** by ensuring Citizens Advice Calderdale is sustainable & meeting the needs of the community
- **Meet people and build relationships** with trustees, staff and other volunteers
- **Build on your skills**, gain more experience and increase your employability
- We also reimburse reasonable, out of pocket expenses.

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 judgment
- Have good numeracy skills to understand accounts
- Be willing to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
- Be willing to undertake training in your role

How to get involved:

Complete the short application & diversity monitoring form, which **you can download by clicking 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 our organisation 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 you're interested in is a good fit.

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 (www.gov.uk/contact-ukvi-inside-outside-uk)

How much time do you need to give?

Our Trustee Board usually meets 6 times a year virtually, on a Wednesday from 6-7pm. You may need to attend other meetings regarding specific projects/sub-committees or meet with volunteers and staff occasionally within the local Citizens Advice. Our AGM is held each November and is a physical

meeting.

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

Valuing inclusion

Our volunteers come from a range of backgrounds and 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 we will use your information on your Application Form

Your information will only be seen by staff involved in the recruitment process and will be stored securely. We do not retain unsuccessful application forms.

All use of volunteer information will be relevant to their involvement, and may include:

- Contacting volunteers when necessary
- Monitoring statistical details of our volunteers
- Providing ongoing support to volunteers
- Addressing problems or complaints

If you have any questions about the use of your data, please contact us.

How we use the information on your diversity monitoring information form

Background

Citizens Advice values diversity, promotes equality, and challenges discrimination. We welcome and encourage volunteer applications from people of all backgrounds, age, disability, gender, gender identity, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sexual orientation.

Monitoring recruitment and selection procedures is one way to ensure that there is no discrimination in our recruitment process. To do this we need to know about the diversity profile of people who apply for volunteer roles.

Data protection overview

- If you are happy to provide it, we will use this information for the sole purpose of allowing us to monitor equality of opportunity and treatment as necessary to maintain or promote equality.
- The information you give us will be kept securely, won't be shared outside the service and is confidential.
- It will not be seen by anyone responsible for making recruitment decisions or have any impact on you directly.

- If you would prefer not to answer any of the questions, please leave them blank.

If you would like us to stop using the information you provide, then please contact us through districtoffice@calderdalecab.org.uk

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