

# Ever thought about being a Trustee?



**citizens  
advice**

**Halton**



# Message from the Chair

**Claire Pentin**

Dear Candidate,

Thank you for your interest in becoming a Trustee on the Board of Citizens Advice Halton. It is an opportunity to be a leading part of a charity which helps some of the least well-off people in our community.

In a different role, I worked with colleagues from Citizens Advice Halton for many years before I joined the Trustee Board in 2023. **I am continually impressed by the dedication and enormous 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 5,000 local people and give advice on around 20,000 different issues. We offer a range of specialist advice and support services, such as debt, welfare benefits, budgeting, employment, housing, consumer, for people of all ages and conditions.

The role of the Trustees is to make sure that the organisation lives within its means and plans for the future. We take ultimate responsibility for the work of our volunteers and paid staff. It is sometimes challenging but always rewarding to be part of an organisation which can help and advocate for some of the most disadvantaged members of our community.

As you will appreciate, with the ongoing Cost of Living crisis, rising domestic violence, weak economy, **the work of Citizens Advice Halton has never been more desperately needed**. Demand from the public for our service is very high, and far outweighs our current available resources.

So, we must become:

- More innovative 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 vocal in our Research & Campaigning work (our advocacy).

Following a refresh of our Trustee board, my fellow Trustees and I wish to **appoint up to five new Trustees** with any of the following experience and/or skill sets:

- A connection with Halton
- Lived experiences of the types of issues affecting our clients
- HR/Personnel
- Finance
- Digital
- Marketing & Communications
- Working within Public Health/NHS/Local Authority
- Legal
- Risk Management & Compliance

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

My fellow Trustees and I are also **committed to increasing the diversity of our Board** (and our thinking) at Citizens Advice Halton. To that end, we particularly welcome applications from people we would like to see better represented on our Board – women, people of colour, LGBTQ+ people, disabled people, young people.

If you are interested in any of this role, then please do get in touch to discuss the opportunity further or you can **download the application form by clicking [here](#)**.

**Claire Pentin**

Chair of Citizens Advice Halton



# About Citizens Advice Halton



Citizens Advice Halton 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 Citizens Advice Halton we also have **specialist services** such as debt advice, welfare benefits tribunal representation, employment casework, financial capability.



At Citizens Advice Halton we have **over 30 trained volunteers and 35 paid staff** operating from our offices in Widnes & Runcorn and each year they help over 5,000 people in a range of ways including face to face, over the phone, by email and webchat.

## 2024 - 2025 key statistics



7,690 people helped



Advised on 54,116 issues



38% benefits,  
28% debt,  
34% other areas of law



65% clients were disabled or had a long-term health condition



55% clients were female



9% clients were BAME



£7.9mil debt written off



£6.2mil other financial gains



£80k worth of essential whitegoods, vouchers, etc.

**For more information about joining our team please feel free to contact our Chief Officer**

Email: [Hitesh.Patel@citizensadvicehalton.org.uk](mailto:Hitesh.Patel@citizensadvicehalton.org.uk) Tel: 0151 257 2443

# The role of a Trustee



## 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 6-7 meetings per year
- Work on specific projects with other trustees or staff within Citizens Advice Halton to further our strategic objectives
- Take an active part in discussions during board meetings and work with other trustees to:
  - Set policy and strategy direction, set targets and evaluate the performance of the local Citizens Advice
  - Monitor the financial position of the local Citizens Advice ensuring that it operates within its means and objectives and ensuring proper financial control systems are in place to safeguard the organisation's resources that there are clear
  - 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 our work and how effectively we operate including action for improvement



## What's in it for you?

- **Satisfaction of making a positive impact for the community** - as a trustee, you would be helping to deliver a vital local service that, helps thousands of people every year to find a way forward
- **Expenses** - all trustees are volunteers, which means they aren't paid. However, we do pay out of pocket expenses, such as travel to-and-from meetings.
- **Training** - all trustees are given training and can attend events so that you know what is expected of you & how to carry out your role.
- **Experience** - being a trustee is a good experience to put on your CV. It shows that you can hold a position of responsibility, work with others and help to lead and guide an organisation.



## What do you need to have?

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

- Understand and accept the responsibilities & 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 much time do you need to give?

Our Trustee Board usually meets 6 or 7 times a year, on a Wednesday from 5pm-7pm.

Trustees on our Finance & Risk sub-committee meet online, once a quarter, usually 12noon – 1pm on a Monday.

Trustees are also encouraged to occasionally meet with volunteers and staff within the local Citizens Advice.

**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 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 forms, which you can **download by clicking [here](#)**.
- We'll invite you for an informal interview to discuss the role.

This is nothing to worry about, it's a chance for you to find out more about the role, and Citizens Advice Halton 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 for you.

*"I really enjoy  
using my skills and  
knowledge to help this  
charity meet the needs of  
our community.  
That's really  
important to me."*

## 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 ([www.gov.uk/contact-ukvi-inside-outside-uk](http://www.gov.uk/contact-ukvi-inside-outside-uk))



## How we will use your information on your Application Form

The information you give us on the Application form will be used to help us decide whether to recruit you as a Trustee. It will only be seen by staff involved in the recruitment process and will be stored securely. We do not retain unsuccessful application forms.

If you are recruited, we will retain your contact information in order to involve and support you. We will also collect additional information, such as next of kin details, and over time records of training, support meetings and where relevant, appraisals. Again, it will be kept securely, and only those people who need to see your information will have access to it.

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

- Contacting trustees when necessary
- Making changes to role, support or equipment to improve accessibility
- Monitoring statistical details of our trustees
- Providing ongoing support to trustees
- Monitoring the quality of advice given to clients
- Addressing problems or complaints

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

## How we will use the information on your Trustee diversity monitoring information form

Citizens Advice values diversity and promotes equality. We welcome and encourage volunteer applications from people of all backgrounds.

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

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 within Citizens Advice. Our legal basis for using your data in this way is our legitimate interests and substantial public interest in maintaining equality of opportunity or treatment in our service.

The information you give us will be kept securely, won't be shared outside the service and is confidential. This form will be separated from your application form, and it will not be used within the decision-making process or have any impact on you directly.

Please see our privacy notice [<https://haltoncab.org.uk/about-us/privacy-policy/>] for more information about how we process your information.

**If you would prefer not to answer any of the questions we ask, please leave them blank.** If you have any questions about how we use your data or would like to make an information rights request, please contact us.



**Citizens Advice Halton** (the operating name for Halton Citizens Advice Bureau), Company limited by guarantee registered number: 5346702, England Charity registration number: 1118300. Authorised and regulated by the Financial Conduct Authority FRN: 617620. Registered office: Unit 3 Victoria Building, Lugsdale Road, Widnes, Cheshire, WA8 6DJ.