**Trustee**

**information pack**

Thanks for your interest in finding out more about Citizens Advice Halton and volunteering with us.

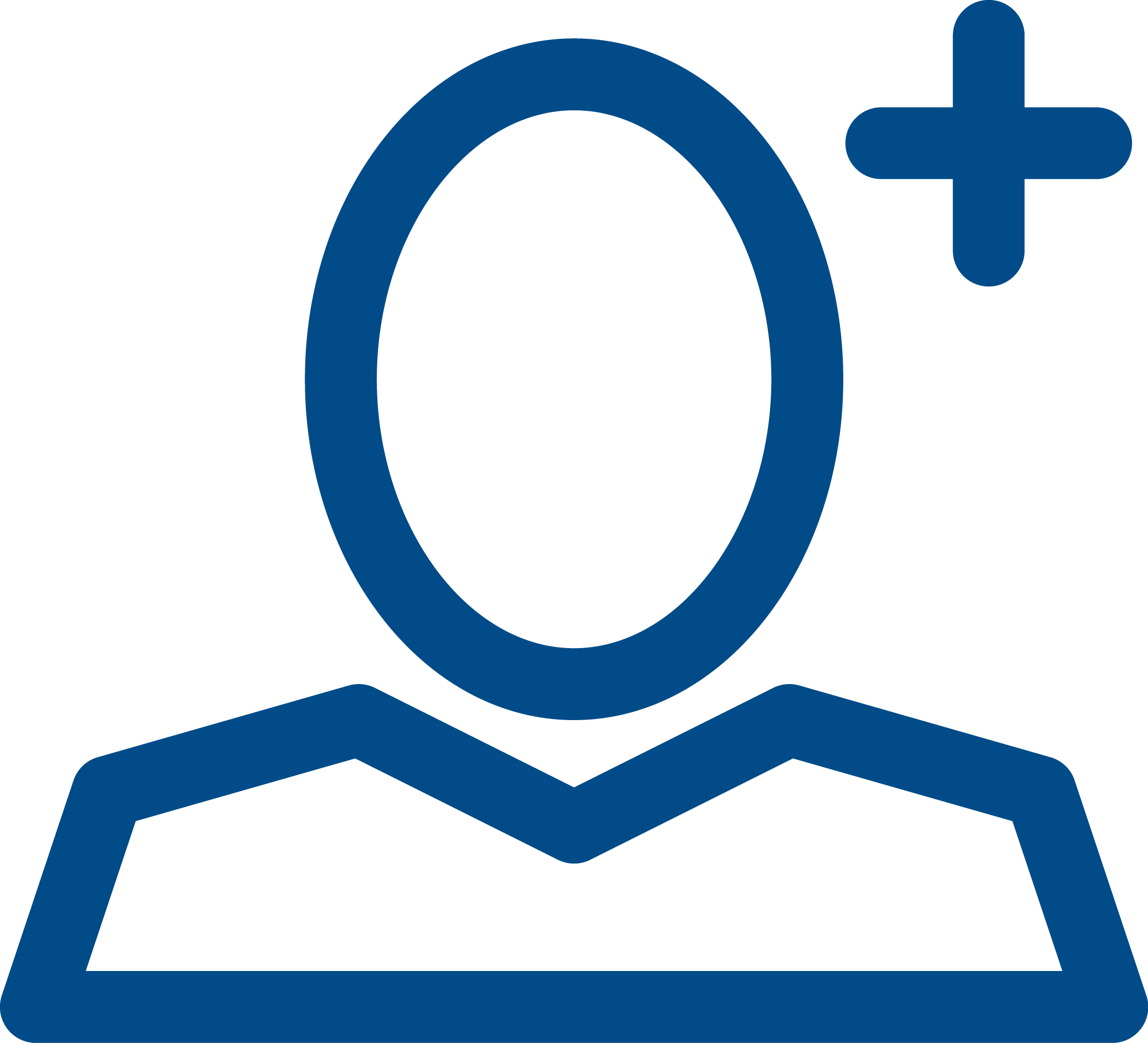
This pack will give you more information about our Trustee role and how to apply.

If you have any questions or need this pack in another format please

email us: **smt@citizensadvicehalton.org.uk**



**What does Citizens Advice Halton do?**

Citizens Advice gives 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 50 trained volunteers and 30 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 web-chat.

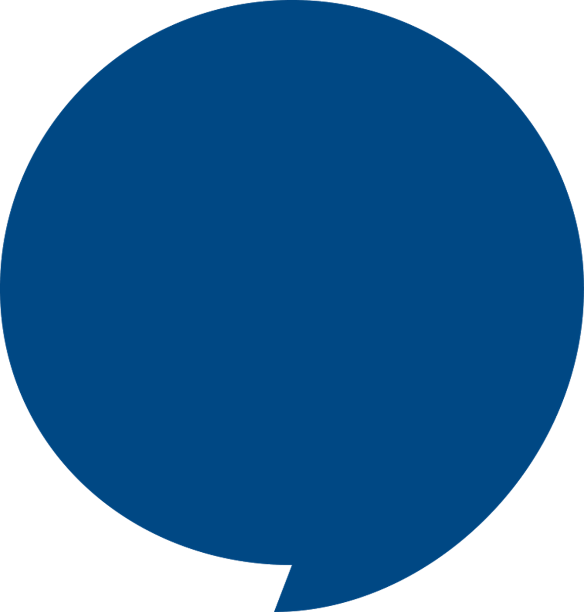
**The role of a Trustee**



**What will you do?**

* Complete an introduction for your role
* Maintain an awareness of how the local Citizens Advice is operating
* Read papers for board meetings and attend 6 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 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 its own work and how effectively it operates including action for improvement

**What’s in it for you?**



I run a small

business and really

enjoy using my skills and knowledge to help this charity and make sure we can meet the needs of our

community - that’s really

important to me.

* 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 and increase your employability

* We’ll reimburse expenses too.



**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 much time do you need to give?**

Our Trustee Board usually meets 6 or 7 times a year, on a Wednesday from 5pm-7pm. You may need to attend other meetings if you’re involved in specific projects, or 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.**

**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 at the end of this booklet
* 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.

**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:

Hitesh Patel (email: hitesh.patel@citizensadvicehalton.org.uk)

**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 in order to involve you will have access to it.  
  
All use of volunteer information will be relevant to their involvement, and may include:

* Contacting volunteers when necessary
* Making changes to role, support or equipment to improve accessibility
* Monitoring statistical details of our volunteers
* Providing ongoing support to volunteers
* 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 Jo Jones on 0151 257 2443

**How we will use the information on your Trustee 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 that helps us 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 at Citizens Advice Halton.

**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 within Citizens Advice Halton.
* 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 are successful in your application and we require this information for other purposes, you will be asked to provide it separately - i.e. this form will not be used for other purposes.
* **If you would prefer not to answer any of the questions we ask, please leave them blank.** If you would like us stop using the information you provide, please contact us.

**Citizens Advice Halton**

**Trustee Application form**

If you need this form in another format, please contact us on 0151 257 2443

**Personal details**

|  |  |
| --- | --- |
| **Surname:** | **First Name:** |
| **Address and postcode:** | |
| **Email address** | **Contact telephone number:** |
| **Preferred method of contact:** | |

**Trustee volunteer role, skills and experience**

|  |
| --- |
| **1. Describe any skills you have that would be useful for the role you’re**  **interested in:**  E.g. talking to people face to face or on the phone, IT skills, speaking / writing in a language other than English, British Sign Language, good verbal / written communication skills, problem solving. |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | Legal knowledge |  |  | Financial management |  | | Equality and diversity |  |  | Fundraising |  | | Managing premises |  |  | Marketing & Communication |  | | Digital & Information Technology |  |  | Human Resources / Personnel |  |   **Use the space below to provide additional information:** |
| **2. Is there anything you have done over the past few years that you would like to**  **tell us about?**  For example, employment, work experience, volunteering, community activity (involvement in tenants’ associations, school activities, support groups), caring for children, other relatives or friends, classes, training courses etc. |
|  |
| **3. Why do you want to want to be a Trustee of Citizens Advice Halton? What do you hope to** **get from the experience?** |
|  |
| **4. What do you think are some of the main problems facing your community?** |
|  |
| **5. Is there anything else you would like to say about yourself?** |
|  |
| **6. Are there any adjustments we can make to assist you in your application and**  **/ or interview?**  This information will be treated as confidential. We follow the social model of disability which believes that it is the barriers created by society which disable people. We will use reasonable adjustments wherever possible to remove those barriers. |
|  |
| **7. Is there any equipment or support that we can provide to help you carry out the volunteer role itself?**  This information will be treated as confidential. Please be assured that we will be supportive in discussing any adjustments with you at any stage of the recruitment and selection process. |
|  |

**References**

Please give the names and addresses of two people, who know you in a work related, academic or professional capacity. For example, an employer, teacher or tutor, colleagues or ex-colleagues, or someone who knows you well (other than your family).

|  |  |  |
| --- | --- | --- |
|  | **Referee 1:** | **Referee 2:** |
| **Name:** |  |  |
| **Address and postcode:** |  |  |
| **Email address/contact telephone number:** |  |  |
| **In what capacity do they know you:** |  |  |

|  |
| --- |
| **Declaration –**  All the information I have provided above is accurate to the best of my knowledge |
| Signed: Date: |
| **If you have given us any information about your health, disability or access requirements, under data protection law we need your explicit consent to hold or use that information. We will only use it in order to allow us to make reasonable adjustments and/or to keep you safe, and it will be held securely.**  I give my consent for this information to be used by Citizens Advice Halton |
| Signed:                                                               Date: |

**Please return this form to:**

**Email:** [**smt@citizensadvicehalton.org.uk**](mailto:smt@citizensadvicehalton.org.uk)

**Post:** Citizens Advice Halton, Unit 3 Victoria Buildings, Lugsdale Road, Widnes WA8 6DJ

**Diversity Monitoring Form**

|  |  |
| --- | --- |
| **Applicant ref. number**  **(local Citizens Advice use only):** |  |
| **Which volunteer role are you applying for?** | **TRUSTEE** |

**Age**  
Which age bracket do you fit into? Put a cross in the relevant box.

|  |  |  |  |
| --- | --- | --- | --- |
| Under 25 |  | 55 - 64 |  |
| 25 - 34 |  | 65 and over |  |
| 35 - 44 |  | Prefer not to say |  |
| 45 - 54 |  |  |  |

**Gender**  
What term best describes your gender? Put a cross in the relevant box or write in a preferred term.

|  |  |
| --- | --- |
| Female |  |
| Male |  |
| I prefer to use another term. Please write in: ……………………………………... |  |
| Prefer not to say |  |

**Sexual orientation**  
What is your sexual orientation? Put a cross in the relevant box or write in a preferred term.

|  |  |  |  |
| --- | --- | --- | --- |
| Heterosexual/Straight |  | Bisexual |  |
| Gay Man |  | I prefer to use another term. Please write in: ………………………………………. |  |
| Gay Woman/Lesbian |  | Prefer not to say |  |

**Ethnic origin**  
How would you describe yourself? Choose **one** section (A to E) and put a cross in the relevant box within it.

|  |  |  |  |
| --- | --- | --- | --- |
| **A.  White** | English/Welsh/Scottish/Northern Irish/British |  | Any other White background  Please write in………………………………………. |
| Irish |  |
| Gypsy or Irish Traveller |  |
| **B.  Mixed/multiple ethnic groups** | White & Black Caribbean |  | Any other Mixed/multiple ethnic background  Please write in………………………………………. |
| White & Black African |  |
| White & Asian |  |
| **C.  Asian/Asian British** | Indian |  | Any other Asian Background  Please write in………………………………………. |
| Pakistani |  |
| Bangladeshi |  |
| Chinese |  |
| **D. Black/African/ Caribbean/Black British** | African |  | Other Black/African/Caribbean background  Please write in………………………………………. |
| Caribbean |  |
| **E. Other ethnic group** | Arab |  | Any other ethnic group  Please write in………………………………………. |
| **Prefer not to say** |  |  |  |

**Disability –** Do you consider yourself to be a disabled person as defined under the Equality Act 2010 (i.e. someone with a ‘**physical or mental impairment which has a substantial and long term adverse effect on that person’s ability to carry out normal day-to-day activities**.’

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Yes |  | No |  | Prefer not to say |  |

*The information on this form is for monitoring purposes only. If you require any reasonable adjustments to be made in the recruitment process or at work subsequently if appointed, please make sure you tell us separately from this form.*

**Gender Identity -** Do you identify as \*Trans?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Yes |  | No |  | Prefer not to say |  |

**\*Trans is an umbrella term to describe people whose identity is not the same as the sex they were assigned at birth. People under the trans umbrella may describe themselves using one or more of a wide variety of terms – including transgender.**

**Religion or belief -** Which group below do you most identify with? Put a cross in the relevant box.

|  |  |  |  |
| --- | --- | --- | --- |
| No religion |  | Jewish |  |
| Christian (including all denominations) |  | Muslim |  |
| Buddhist |  | Sikh |  |
| Hindu |  | Prefer not to say |  |
| Any other religion or belief.  Please write in………………………………………. | |  | |

**How did you hear about this opportunity? -** Please include details below:

|  |
| --- |
|  |