

# Trustee Recruitment Pack

*June 2025*



Coventry



Welcome to Kirby House  
Entrance  
Opening Times  
The building is open to all from 10.00am - 4.00pm, Monday to Friday.  
We have a drop-in service every Wednesday from 1.00pm.

KIRBY HOUSE

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Electric vehicle  
recharging point  
4am - 8pm  
2 hours  
No return  
within 2 hours  
Parking fee for  
electric vehicles  
£10.00



# Welcome

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## Dear candidate,

Thank you for your interest in becoming a Trustee of Coventry Citizens Advice.

We are one of the largest local Citizens Advice charities in the country, supporting more than 13,000 clients each year with over 30,000 different issues. From fuel poverty and welfare benefits to housing and debt, we give people the knowledge and confidence they need to find a way forward — whoever they are and whatever their problem. For everyone, for over 80 years.

Our service is more vital than ever. In today's economic climate, with rising living costs, energy prices, and housing challenges, our clients are navigating increasingly complex problems. Every year, we help secure nearly £8 million in expected financial gains for people in Coventry who might not otherwise have known what support was available.

This work would not be possible without our people — a dedicated team of staff and volunteers, including our Board of Trustees, who provide strategic direction, oversight, and leadership. As a trustee, you will play a crucial role in guiding our work and helping us adapt to the changing needs of the community.

We hope this pack gives you a clear understanding of the impact we make, the responsibilities of a trustee, and the values that underpin everything we do. Most of all, we hope it inspires you to join us in helping build a fairer, stronger Coventry.

Thank you for considering this opportunity.

Warm regards,

**Peter Frost**  
Chair of the Board of Trustees

# About Us

The Citizens Advice service provides free, independent, confidential and impartial advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

## Our Aim

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To provide the advice people need for the problems they face.

To improve the policies and practices that affect people's lives.

## Our Vision

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We empower individuals and families in need by delivering high-quality advice and advocacy. By continually expanding our partnerships and stakeholder network, we enhance our capacity to influence policy and drive meaningful change for the benefit of the community. Our highly trained professional teams possess the expertise and skills necessary to create the greatest positive impact.

## Our Values

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We strive to make a meaningful difference in the community.

We foster learning and growth, continually developing the knowledge and skills of our people.

We celebrate both individual and collective successes, building on them to achieve even more.

We embrace diversity and advocate for equality in all that we do.





# Strategy

**Our service must adapt to a changing world. With new technologies and rising expectations, the cost-of-living crisis has deepened inequalities.**

Those living below the poverty line are falling further behind those at or above it. Credit is more accessible, but rising costs and low-paying local jobs leave many unable to cope.

Individuals in low-paid work, as well as those with long-term health conditions or disabilities, have been disproportionately affected by the pandemic and its severe economic aftermath.

Our service must not only prepare for the future but meet the needs of today. We are committed to providing consistent, flexible support across Coventry, ensuring that all residents can access the help they need, when and where they need it. Particular focus will be given to vulnerable clients who face barriers to accessing advice through technology.





# Finances 2023-2024

**Turnover over**

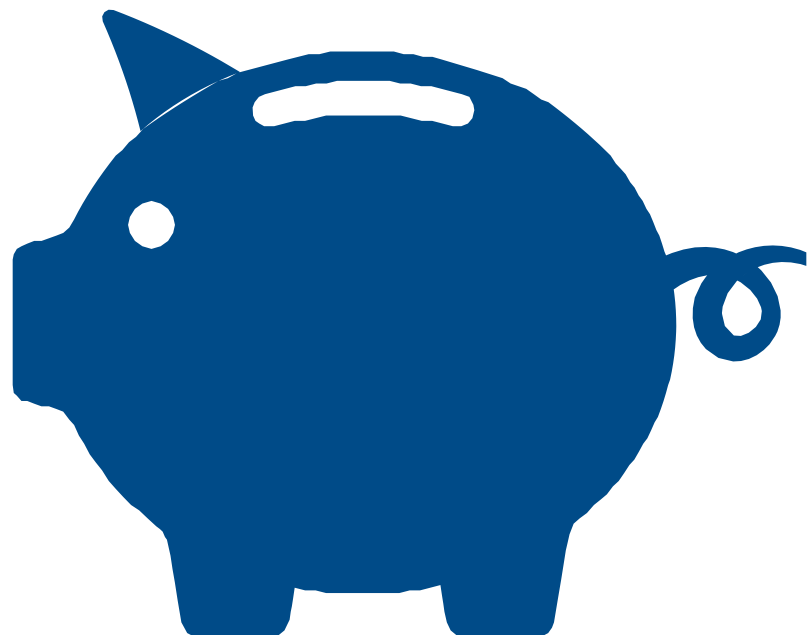
**£1.7m**

**Expenditure**

**£1.62m**

**Net surplus**

**£75,000**



We are dedicated to taking meaningful action to challenge discrimination and promote diversity - both in the services we provide and as an employer. We also understand the importance of supporting clients with mental health challenges. To this end, we will ensure our staff and volunteers receive thorough training, equipping them to provide confident and compassionate assistance.

The Citizens Advice brand is nationally recognised for its quality, reputation, and trustworthiness. In Coventry, we are committed to upholding and exemplifying these values in everything we do.

# Equity, Diversity and Inclusion Statement

**Coventry Citizens Advice (CCA) is committed to providing a supportive and inclusive culture for:**

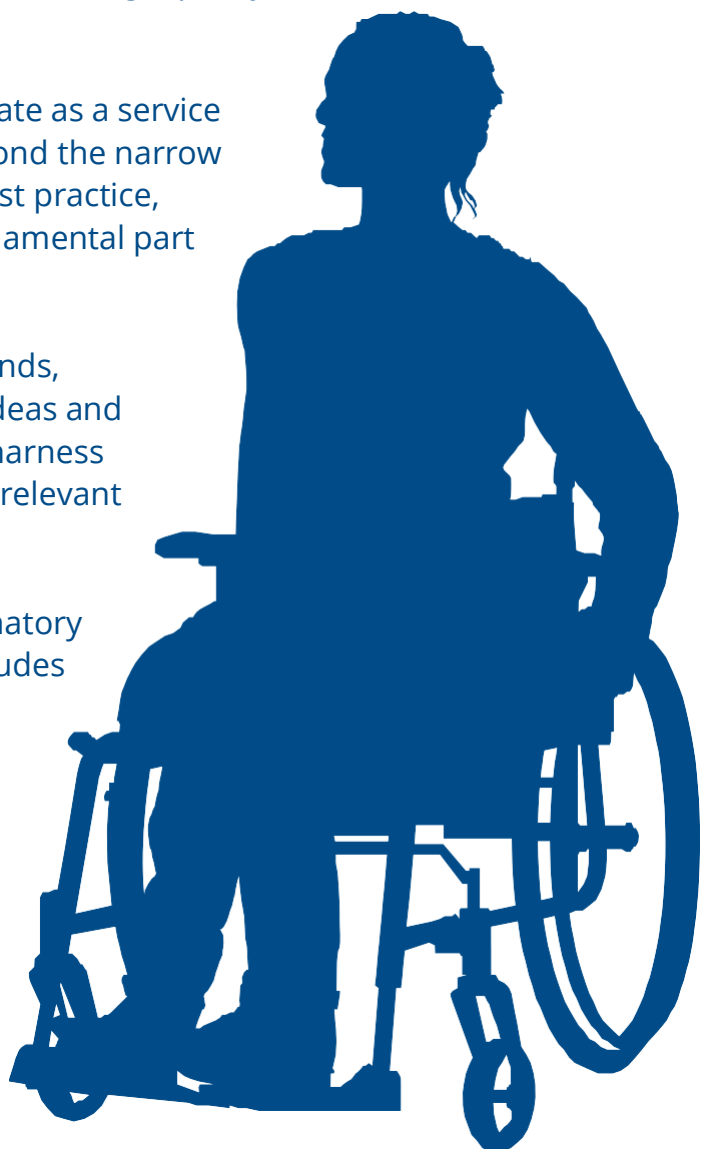
- **all those who need our services**
- **our volunteers**
- **our staff**
- **other stakeholders**

We recognise the positive value of diversity, promoting equality and fairness, and challenging discrimination.

We welcome our legal duties not to discriminate as a service provider and an employer. We aim to go beyond the narrow scope of legislative compliance and follow best practice, making equality, fairness and diversity a fundamental part of all our activities.

We recognise people with different backgrounds, skills, attitudes and experiences bring fresh ideas and perceptions, and we wish to encourage and harness these differences to make our services more relevant and approachable.

CCA will not discriminate or tolerate discriminatory behaviour on the grounds of race (which includes colour, nationality and ethnic or national origins), sex sexual orientation, gender reassignment, disability, religion or belief, marital or civil partnership, pregnancy and maternity, or age, social class, educational background, employment status, working pattern, trade union membership or any other factor.



# Trustee Role Description

## *What will you do?*

- complete an induction for your role
- maintain an awareness of how Coventry Citizens Advice (CCA) operates
- read papers for board meetings and attend the majority of the meetings
- work on specific projects with other trustees or staff within CCA to further the strategic objectives of the organisation
- 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 CCA
  - monitor the financial position of CCA ensuring that it operates within its means and objectives, ensuring that there are clear
  - ensure that all the finances and supporting financial control systems of CCA 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 financial position of CCA ensuring that it operates within its means and objectives, ensuring that there are clear lines of accountability for day to day financial management
  - seek the views of all sections of the community and monitor how well the service meets the needs of the local community
  - review its own work and how effectively it operates including action for improvement

## *What's in it for you?*

- make a positive impact for people in your local area by ensuring CCA 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
- increase your employability



## *What do you need to have?*

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- 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 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 in your role

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

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The Trustee board usually meet in the evenings, and you'll likely need to give 5 – 7 hours per month and you may need to attend other meetings if you're involved in specific projects, or meet with volunteers and staff occasionally within Coventry Citizens Advice.

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



We are particularly keen to hear from individuals with experience in **Human Resources, Research and Campaigns or Fundraising**, as these areas are of strategic importance to our current and future work. Applicants with expertise in these fields will be especially welcomed as we look to strengthen our Board's overall capacity and insight.

## Valuing inclusion

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- 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.

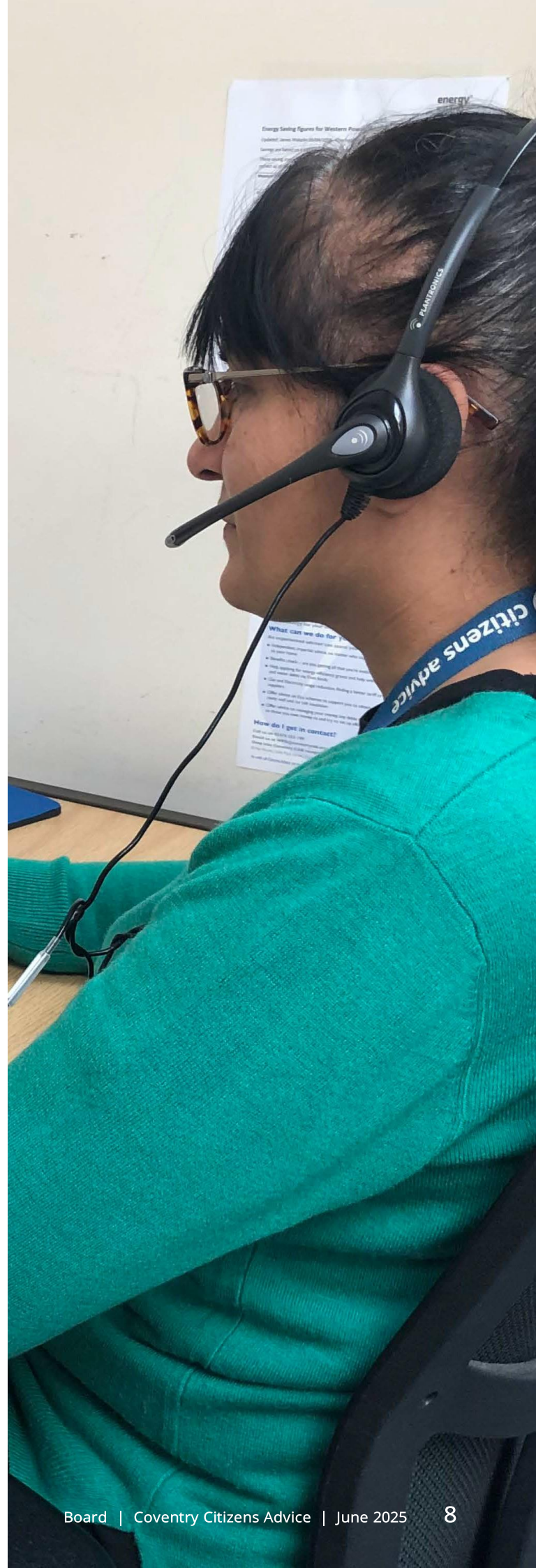
## Eligibility

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To serve as a trustee of Coventry Citizens Advice, you must not be disqualified under the *Charities Act 2011*.

This means you must not be an undischarged bankrupt, have an unspent conviction for certain offences (including dishonesty or deception), or be on the disqualified trustees register. If you are subject to a disqualification but have a waiver from the Charity Commission, you may still be eligible.

All applicants will be asked to declare that they are not disqualified from acting as a trustee and may be required to complete a formal declaration.



# How to Apply

Please complete the application form ensuring your application contains a detailed description of how your experience aligns with the criteria.

***Please email your application to:  
recruitment@coventrycab.org.uk***

Once we receive your application form, we will send a confirmation email to you. Please note CVs will not receive a response.

***If you are unable to make an electronic application, you may submit your application on paper and post to:***

**Recruitment, Coventry Citizens Advice,  
1-7 Station Street East,  
Foleshill,  
Coventry CV6 5FL**

If you require a reasonable adjustment or other assistance to apply for this role please contact recruitment via email.

Wishing you all the best with your application!

The closing date for applications is **31 August 2025 @ 09:00**

Interviews to be held week commencing **1 September 2025**.





