

**citizens
advice**

in West Sussex
North South East



**Finance Trustee Recruitment
Candidate Information Pack
June 2025**



Eastside People

Welcome

Thank you for your interest in the role of Finance Trustee at Citizens Advice West Sussex (CAWS). I hope the information in this pack will encourage you to apply for this interesting and enjoyable position that helps make a real difference to the lives of local people. We are recruiting as part of pro-active succession planning and want our Finance Trustee to contribute to our strategic development as we meet the challenges of increasing demand and operating within a tough financial environment. We also anticipate changes to local government structures as part of the government's plans for devolution, which have been supported by the three upper-tier Councils covering Sussex.

We are confident that CAWS is well-placed to face these changes and to deliver the services the people in our communities need. We have excellent relationships with the County Council and the District and Borough Councils covering West Sussex who jointly commission our core services. We are part of the local community with advice centres in six locations and established partnerships with the local voluntary & community sector, and with the NHS. While we have been a local charity for 85 years, as part of the national Citizens Advice network we benefit from the systems, information resources and knowledge sharing with other local services, and clearly punch above our weight in mobilising resources, delivering services, demonstrating impact and advocating for policies and programmes that make a positive difference to our residents. All of these strengths have been at the fore of our work in recent years as we supported people through the Covid pandemic and the subsequent cost of living pressures.

Our work is regularly audited by national Citizens Advice, we are committed to excellence and believe that the quality of our services is good, and our finances are healthy with appropriate levels of reserves. However, we are not complacent and are committed to continual improvement in all of these areas so that we can better serve our community. I hope that as you read this pack you will be enthused to join us on this journey.

Mike Jones,

Interim Chair



About us

Citizens Advice are the people's champion. For 85 years, we've been working on issues that affect the whole of society to help to shape a society that's fairer for everyone. No other advice service sees so many people with so many different kinds of problems, and that gives us a unique insight into the challenges people are facing today. By helping people with the underlying cause of their problems and helping to prevent them getting worse, we save the government and public services hundreds of millions of pounds every year. With the right evidence, we can show big organisations – from companies right up to the government – how they can make things better for people.

Citizens Advice West Sussex (CAWS) works as part of the national network as an independent, local charity, and company limited by guarantee. The charity has annual income of circa £2.6 million and employs around 70 staff supported by 250 volunteers, working from six locations across the County.

What we do

We offer advice and assistance to people who live and work in West Sussex. We helped 40,000 people in the twelve months to 31st March 2024 (an increase of 9% on the previous year) with challenges such as managing debt, understanding rights at work, or housing issues. Through our dedicated team of staff and volunteers we ensure that essential information and advice is available in times of need to prevent issues from escalating and to help individuals recover from crises.

Our Community Advice Service is accessible to all West Sussex residents via telephone and digital channels, with in-person centres in Crawley, Horsham, Haywards Heath, East Grinstead, Worthing, and Shoreham-by-Sea.

In addition to this core service, we deliver numerous significant services and projects funded by partners such as Macmillan Cancer Support, the Trussell Trust, the Department for Work and Pensions (DWP), and the National Lottery. These projects provide specialised advice, targeting individuals at increased risk of poverty, health deterioration, and other vulnerabilities, and are also focused on reducing inequalities.

As part of the national Citizens Advice network, we share knowledge and best practice to provide quality service and work to address the underlying causes of people's problems through research and campaigns.

| Our Vision | Our Mission |
|---|--|
| To be a leading provider of information and social change where our communities thrive and inequalities are reduced by helping people take control of their lives through accessible, responsive advice and improving our community through expert social policy. | We will provide high quality information and advice for our community by our community, so people know their rights and responsibilities, and we influence system change through sharing our insight and giving our community a voice. |

Our commitment is to promote equality through our services and workplace, aligned with National Citizens Advice's aims. We aim to challenge discrimination through advice, champion equality through research and campaigns, and value diversity as an employer and volunteer agency.

Finances

Income and Expenditure for the last two years were:

| | 2022/23 | 2023/24 |
|-------------|-------------|-------------|
| Income | £ 2,344,762 | £ 2,640,465 |
| Expenditure | £ 2,274,250 | £ 2,507,741 |
| Surplus | £ 70,512 | £ 132,724 |

The largest source of income (42%) is via a Generalist Advice contract from local authorities serving West Sussex, led by West Sussex County Council, from their Public Health budget, supported by District and Borough Councils for Adur & Worthing, Arun & Chichester,

Crawley, Horsham, and Mid-Sussex, from Adult Social Care budgets. (Delivery of the contract in the areas covered by Arun & Chichester Councils is sub-contracted to another Local Citizens Advice service although CAWS remains accountable to the funders.) This contract was secured in 2021, and will run until 2028 subject to periodic reviews, providing a considerable degree of stability and resilience for the charity.

The Generalist Advice contract is augmented by additional contracts and grants for specific projects including a share of national funding programmes such as the Household Support Fund, Help to Claim Universal Credit, and energy advice; and specialist welfare benefits advice commissioned by Macmillan Cancer Relief.

Our reserves at the end of the 2023/4 financial year were £865,917 and we have designated funds to develop our infrastructure, realise further efficiencies and to support our people.

Background to the role and priorities

Our board currently comprises eight trustees who have served between two and eight years. Our Finance Trustee will have served six years in 2025 and would like to retire once a successor is in place and there has been time for handover.

We've identified the following as priorities for the Board

- Developing a stronger partnership between the board and the CEO and senior management team building on the good work being done on oversight and compliance and enabling trustees to engage with work on the charity's strategic direction
- Supporting work to foster a culture of innovation and development so that the charity remains impactful and relevant at a time when the need for our services is increasing faster than the available resources. Funding from public funds is likely to remain very tight for the foreseeable future so diversifying revenue will be important. The volunteering environment is also changing and our offer needs to reflect this.
- Increasing the visibility of trustees among staff, volunteers, delivery partners and other stakeholders, and developing opportunities for closer working.
- Strengthening our work on equity, diversity and inclusion.

We would welcome in our new Finance Trustee someone able to advise as we develop the strategic direction of the organisation amidst the complexities of our current and future

funding streams, as well as navigate the challenges we face spending our reserves, and the need to balance risk and innovation.



Role Description

Key Information

| | |
|-------------------------|---|
| Location: | Shoreham and Worthing |
| Time commitment: | There are four Board meetings each year, which usually take place on a weekday evening from 5:00 to 7:00pm. In addition, there are four committees, Finance & Facilities, Compliance & Governance, Strategy, and the People committee, which meet online quarterly between Board meetings. We also have an annual planning day. Expected time commitment is 8 - 12 hours per month on average, worked across the year |
| Remuneration: | The Finance Trustee role is not accompanied by any financial remuneration, but reasonable expenses may be claimed. |

Finance Trustee

Role expectations

The role of the Finance Trustee is to oversee, approve and present budgets, accounts and financial statements as well as the preparation and presentation of financial reports to the board. In addition, ensure that appropriate accounting procedures and controls are in place and liaise with the CEO and her senior team about financial matters.

Responsibilities

- Understand the accounting procedures and key internal controls to be able to assure the board that the charity's financial integrity is sound
- Explain, guide and advise the board on the key assumptions and financial implications of the local Citizens' Advice budgets, operational and strategic plans and keep the board informed about its financial duties and responsibilities
- Ensure that the organisation has an appropriate reserves policy and a realistic budget that meets the services' needs

- Support the CEO and Head of Finance and provide advice on preparation of budgets, accounts and financial statements for review and approval by the Board
- Ensure that annual accounts are prepared in compliance with SORP (Statement of Recommended Practice) Accounting for Charities and submitted by the deadline to the Charity Commission and/or Registrar of Companies, and make arrangements for them to be audited or independently examined as required
- Present accounts at the Annual General Meeting (AGM) in an accessible way for volunteers and staff

Key requirements

For all Trustees

- Commitment to the charity's mission to tackle deprivation and inequality, and alignment with its values, particularly in respecting different cultures and promoting diversity and inclusion
- Understanding of the responsibilities of a charity Trustee and the type of work undertaken by a local Citizens Advice, and the distinction between governance and operations
- Excellent inter-personal and communication skills with the ability to exercise good, independent judgement and to work collegially
- Ability to gain an understanding of the demographics and social and economic environment of West Sussex. A connection with an area served by the charity is desirable
- A willingness to learn about the policies and procedures of Citizens Advice and to undergo training where necessary, e.g. data protection and safeguarding
- A willingness and ability to devote the necessary time and effort to attend Board and other meetings, including preparing and reading for those meetings, and to participate in the effective governance and management of the organisation
- Ability to build an effective relationship with the CEO and provide direction, support and mentoring as required
- Ability to represent the organisation to external stakeholders and to build relationships that strengthen collaboration and partnerships
- Knowledge of how charities operate, charity governance

For the Finance Trustee

- A recognised financial qualification or equivalent knowledge gained by experience
- The ability to take a strategic approach to financial planning and oversight and to help non-financial colleagues understand these
- Previous experience of charity finances and fundraising or a willingness and ability to gain this through training
- Excellent communication and interpersonal skills.
- Analytical ability and good independent judgement.
- Capacity for clear, creative and strategic thinking and vision.



How to apply

[Eastside People](#) is supporting Citizens Advice West Sussex in the recruitment for this role.

Please [click here](#) to apply.

Please use the cover letter (max 2 pages) as an opportunity to add to the information you have shared in your CV and ensure that you cover the following:

- Why are you interested in the Finance Trustee role, and why with Citizens Advice West Sussex?
- How can you contribute to Citizens Advice West Sussex as our Finance Trustee?
Please highlight relevant experience and demonstrate how your skills match the specific requirements of the role as set out in the role description and person specification.

If you would like a call to discuss the role in more detail, please email Lucinda at lucinda@eastsidepeople.org to arrange a convenient time. Having a call of this kind will not influence the success or otherwise of your application.

We want you to have every opportunity to demonstrate your skills, ability and potential. Please contact us if you require any assistance or adjustment so that we can make the application process work for you.

The closing date for applications is **Monday 23 June** with shortlisting interviews taking place as applications are received. The interview process with Citizens Advice West Sussex will take place in the following weeks.

Eastside People is fully committed to equality of opportunity and diversity and work with our clients to ensure that we recruit inclusively, seeking to address the under-representation of some groups of people on boards and in leadership teams.





Eastside
People

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