



Chair of Trustees

Citizens Advice Woking

About Citizens Advice Woking (CAW)

CAW is an independent local charity and a company limited by guarantee. We're local and we're national. The national charity has 4 administrative offices in England and Wales, supporting the work delivered by around 240 independent local Citizens Advice member charities.

We provide free, confidential, impartial, and independent advice and information for the benefit of the local community, to exercise a responsible influence on the development of social policies and to ensure individuals do not suffer through lack of knowledge or an inability to express their needs effectively.

We exist to shape a society where people face far fewer problems. Our national charity and network of local charities are united by this common purpose.

We're driven by our ambition to make things better for people, individually and collectively. We're driven by the power of good advice, to help people solve their problems. And we're driven to change the underlying causes of problems, through our work with governments and other organisations.

Governed by a Board of 8 trustees, CAW has a highly skilled workforce to support the organisation. This incorporates 13 paid staff, including a Chief Officer and Operational Manager, and more than 50 volunteers.

Our generalist advice service is provided by volunteers who carry out reception and administrative duties, give information and advice and have research and campaign roles, and are managed and supported by paid staff. We also have paid caseworkers in the areas of welfare benefits and housing. We also run Projects on behalf of different funders.

Woking is often considered to be an affluent area with high levels of employment and rates of home ownership, however there are significant pockets of deprivation across the borough and our priority is to support the most vulnerable in our community. The

main enquiry areas of welfare benefits, debt and housing continue to be the issues that most of our clients need help with.

The last 18 months has been a challenging period for CAW, summarised as:

- CAW's main funder, Woking Borough Council, issued a Section 114 Notice in July 2023 in response to the 'unprecedented financial challenges facing the authority'. This resulted in the ceasing of the Community Grants scheme, which was the source of CAW's unrestricted grant in 2023/24 (£189,000) and previous years
- We were able to put together a balanced budget for 2024/25, but this did mean having to cut costs, for instance reducing opening times for the drop-in service at its town centre office from 5 days to 3 mornings a week, and reducing the number of applications for charitable support on behalf of clients, instead focusing on advice to help their situation

Despite these challenges, we were able to help more clients than in the previous year. In 2023/24, CAW's income was £485,000, 6,845 clients were supported, and helped with a total income gain of more than £2.8 million. For every £1 invested in CAW's service, £5.58 was generated in savings to government and public services.

Subject to confirmation from funders, CAW anticipates being able to achieve a similar level of income in 2025/26, using some of our well managed reserves to help ensure a continued good level of service for clients. We are now in a position to look to rebuild, with a renewed emphasis on bringing in new projects and seeking new sources of unrestricted grant funding.

At the same time, the need for greater collaboration, partnerships and potential mergers has been recognised across the Surrey network of Local Citizens Advice offices (LCAs). CAW will continue to work closely with the Surrey LCAs, including exploring the potential benefits of mergers.

Chair of Trustees

The Chair of Trustees has a critical leadership role in ensuring the effective governance and success of CAW. Your responsibilities can be divided into **governance, leadership, representation** and **oversight**.

Key Responsibilities

1. Lead the Trustee Board

The Chair's primary role is to lead the trustee board to ensure:

- The charity is well-governed, financially sound, and operating in line with its charitable purpose.
- Trustees understand and fulfil their legal responsibilities, including compliance with the **Charities Act 2011**, charity law, company law and the governing document.
- Meetings and communications are productive, inclusive, and focused on strategic priorities.

Key actions include:

- Setting agendas for trustee meetings in consultation with other trustees and staff (e.g., Chief Officer).
 - Chairing meetings effectively, ensuring all trustees contribute and decisions are made collectively.
 - Ensure that all decisions and actions taken at trustee meetings are actioned.
 - Mediating conflicts or disagreements between trustees, if they arise.
 - Reviewing trustee performance and encouraging ongoing training.
-

2. Provide Charity Leadership

The Chair ensures the charity has a clear strategic direction, in collaboration with trustees and staff. This includes:

- Setting strategy, targets and evaluating the performance of CAW
 - Ensuring decisions align with the charity's aims and principles.
 - Encouraging good working relationships among trustees and between the board and staff.
-

3. Support the Chief Officer and Management Team

The Chair acts as the primary point of contact and support for the CO and the Operational Manager. This involves:

- Acting as a sounding board for the CO and/or Operational Manager on key issues.
 - Monitoring the CO's performance and ensuring they are fulfilling their duties including the conducting of an annual appraisal.
 - Supporting staff morale by maintaining a healthy relationship between trustees and staff, ensuring roles are respected and boundaries maintained.
-

4. Ensure Compliance and Good Governance

The Chair ensures the Board and all the Trustees adhere to best governance practices, including:

- Complying with the membership agreement of the Association of National Citizens Advice Bureaux.
 - Monitoring compliance with Charity and Companies law and regulatory requirements (e.g., Charity Commission guidance and Financial Conduct Authority compliance).
 - Monitoring the financial position of CAW, by working with the Treasurer, to ensure proper financial oversight, including the approval of a budget and ensuring adequate funding and clear lines of accountability for day-to-day financial management.
-

5. Represent the Charity Externally

The Chair may represent CAW with external stakeholders, including:

- Funders and potential funders.
 - Local communities and/or beneficiaries of CAW.
 - Partner organisations, public officials, and the media. This may involve public speaking, attending events, or liaising with key stakeholders to advocate for the charity's work.
 - Attending or securing representation at Surrey Chairs' meetings and establishing relationships with other Surrey Chairs with a view to taking forward opportunities for collaborative working
 - National Citizens Advice to keep in touch with national initiatives which might impact on CAW
-

6. Promote Trustee Development

The Chair will be responsible for -

- Recruiting diverse and skilled trustees, with a range of knowledge and expertise in the areas required.
 - Ensuring new trustees receive a thorough induction into the workings of CAW.
 - Encouraging ongoing trustee training and development.
 - Conducting board evaluations and identifying areas for improvement.
 - Monitoring attendance and commitment of trustees
 - Succession planning for the key roles of Chair, Vice Chair and Treasurer
-

Day-to-Day Tasks of a Chair

Chair's day-to-day duties will include:

- Preparing for and chairing trustee meetings (quarterly or monthly).
 - Reviewing reports from the CO, staff, or sub-committees.
 - Responding to urgent issues or queries raised by the CO or other trustees.
 - Approving major decisions (e.g., signing off on large expenditures or new initiatives).
 - Liaising with trustees, staff, or external partners as needed.
-

Commitment

The time required can vary depending on what is needed from month to month but typically involves:

- Chairing board meetings (e.g., bi-monthly or whenever required).
 - Attending committee or sub-group meetings (e.g., finance, business development).
 - Communicating with the CO and staff regularly.
 - Representing the charity at events or meetings with stakeholders.
-

What's in it for you?

- Play an important role for a well-recognised, respected and much needed charity
- Make a positive impact for people in Woking 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
-

Key Skills and Qualities

The Chair of Trustees should:

1. **Understand governance and charity law** to ensure compliance and accountability.
 2. **Have strong leadership skills** to guide the board effectively.
 3. **Be impartial and fair**, ensuring decisions are made collaboratively.
 4. **Communicate effectively** with trustees, staff, and external stakeholders.
 5. **Be strategic** to focus on the charity's long-term goals while addressing day-to-day challenges.
-

Legal Duties

The Chair shares the same legal duties as all trustees, including:

- **Ensuring the charity delivers its purpose:** All activities must align with the charity's stated mission.
 - **Acting in the charity's best interests:** Decisions must prioritize the charity and its beneficiaries.
 - **Managing resources responsibly:** Overseeing finances, safeguarding assets, and ensuring proper use of funds.
 - **Ensuring accountability:** Meeting reporting requirements to regulators, donors, and beneficiaries.
-



What do you need to have?

- An understanding of the work undertaken by CAW
- An understanding of charity and company law
- An understanding of and acceptance of the responsibilities and liabilities of a trustee
- To be non-judgmental and respect views, values and cultures that are different to your own

- Leadership skills including strategic vision, decision making and the ability to delegate
- The ability to facilitate and lead meetings
- Good interpersonal skills
- Good listening, verbal and written communication skills
- The ability to exercise good independent judgment
- Good numeracy skills to understand accounts with the support of the treasurer
- The willingness to learn about and follow the Citizens Advice aims, principles and policies, including confidentiality and data protection
- To be willing to undertake an induction and continued training for your role

