



South  
Lincolnshire

## Finance Trustee Information Pack



### Our aims

- To provide the advice people need for the problems they face
- To improve the policies and practices that affect people's lives



### Our principles

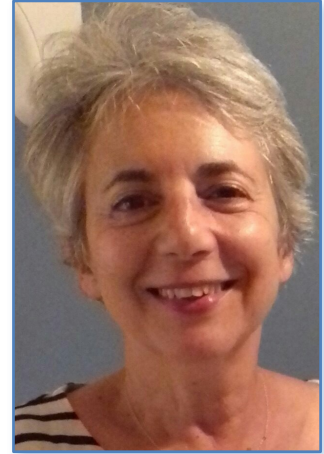
The Citizens Advice service provides **free, independent, confidential and impartial** advice to everyone on their rights and responsibilities. It values diversity, promotes equality and challenges discrimination.

# Introduction from the Chair of the Trustee Board

Thank you so much for your interest in joining the Trustee Board at **Citizens Advice South Lincolnshire**. This pack will tell you about what trustees do, the experience and skills that we seek, and what you can expect of us.

It also includes biographies of the current trustees.

We serve our community from offices in Grantham, Spalding and Stamford, and multiple outreach centres. We are proud of the commitment and professionalism of our staff and volunteers, who deliver a tremendous service in challenging times.



I am privileged to be joined on the Board by a committed, experienced and skilled team of other trustees who share our vision. The Board provides leadership and support for our CEO and senior managers, while properly exercising its governance responsibilities.

We are now looking for a Finance Trustee to guide and advise the Board and the Chief Executive Officer. We will provide a full induction, so you do not need previous experience as a trustee or company director.

If you have a passion to serve your community, we would very much like to hear from you. I would be happy to speak with you informally. You can contact me via email at: [monica.stark@citizensadvicesouthlincs.org.uk](mailto:monica.stark@citizensadvicesouthlincs.org.uk)

**Monica Stark**  
Chair of the Trustee Board  
Citizens Advice South Lincolnshire

# About the Charity

Citizens Advice South Lincolnshire (CASL) is an independent registered charity. We serve over 225,000 people in South Holland and South Kesteven. South Lincolnshire is a rural area covering 1,700 square kilometres.

We support clients with debt, benefits, housing, relationships, employment and immigration problems. We offer information and advice, empowering our clients to find a way forward. We influence policymakers with evidence from our research. We train our volunteers and staff to help with a wide range of issues. If we cannot offer help ourselves, we refer clients to specialists.

We help people on the phone, via email and online chat, and we also offer face-to-face advice. We campaign locally and nationally. We have about 40 staff, most of them part-time, and over 80 volunteers, including eight trustees.

We deal with nearly 60,000 client issues a year. The value of our volunteers' work is more than £700,000 a year and in 2024/25 we helped to secure a total income gain for our clients of over £7 million.

CASL is a member of the national Citizens Advice organisation, which celebrated its 80th anniversary in 2024. CASL is one of over 200 independent charities operating under the Citizens Advice umbrella.

The tough economic climate limits funding for local services, but CASL's finances are comparatively strong.

Three local councils provide our core funding: Lincolnshire County Council, South Holland District Council and South Kesteven District Council. Their support enables us to operate our core services. We also receive a wide range of specific funding to provide targeted advice services to clients.

CASL was founded in 2016, following the merger of the local Citizens Advice charities for South Holland and South Kesteven. Predecessor Citizens Advice charities had operated locally for many years.

Our website offers more information about our work and our services:  
[www.citizensadvicesouthlincs.org.uk](http://www.citizensadvicesouthlincs.org.uk)

## Our offices and outreach sites

Our offices are at Grantham, Spalding and Stamford. We have outreach sites at Bourne, Deeping St James, Holbeach, Long Sutton, Market Deeping and Sutton Bridge, and food banks in Grantham and Stamford.



Contains Ordnance Survey data © Crown copyright and database right

We expect to expand our outreach further during 2026.

# Trustee role description

## What do trustees do?

**Collectively**, trustees have three key functions: setting direction; holding to account and managing risks; and engaging people and influencing culture.

**Individually**, trustees act in the organisation's best interests; manage its resources responsibly; manage risks; and promote a healthy culture.

**Effective trustees** have insight into the organisation; challenge constructively; weigh up conflicting opinions and make decisions; and participate actively on the Board and its subcommittees.

**Trustees also** accept collective responsibility for Board decisions; use impartial judgement; and comply with the Code of Conduct.

In greater detail, **you will**:

- complete a structured and supported induction for the role, with mentoring from a current trustee
- read papers for meetings and attend four Board meetings. four or five sub-committee meetings a year and some other events
- take an active part in Board discussions and work with other trustees to fulfil **the Board's collective responsibilities**, including:
  - ▶ deciding strategic direction and evaluating CASL's performance
  - ▶ monitoring CASL's financial position and financial controls
  - ▶ ensuring planned recruitment of staff and volunteers, and
  - ▶ reviewing CASL's effectiveness and planning improvements.

## The Finance Trustee role

**As Finance Trustee**, you will oversee the financial affairs of the charity, including financial controls, reserves and investment policies, and related legal requirements.

In greater detail, **you will advise and guide the Board on**:

- managing the charity's financial resources sustainably
- financial strategy, planning and risk management
- key assumptions and implications of financial budgets and plans
- monitoring financial performance, and
- financial implications of new projects, grants and fundraising.

**You will also support the CEO and our financial team to:**

- develop budgets and financial forecasts
- present clear and accurate financial information to the Board, including highlighting variances and risks
- manage restricted funds
- prepare annual reports, accounts and returns
- comply with legal requirements, including financial record-keeping, statutory reporting and funder requirements, and
- apply good practice in day-to-day financial administration.

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

**You can:**

- join a well-known, respected national charity
- make a positive impact for people in your community
- meet people, work in a team and build relationships
- gain valuable governance and Board experience
- build on your leadership and strategy skills, and
- increase your employability.

**Trustees are unpaid volunteers, but we can reimburse expenses.**



## **What do you need to become a trustee?**

**Trustees don't need specific qualifications, but we expect all trustees to have six core skills:**

- **Insight into the organisation:** considering CASL's objects and its public benefit strategically
- **Challenging constructively:** clarifying facts; stimulating thought
- **Analysing issues:** being objective; evaluating risks; using evidence; planning ahead
- **Weighing up opinions:** using evidence; balancing long- and short-term; prioritising value
- **Interpersonal skills:** communicating clearly; listening actively; supporting a healthy culture, and
- **Confidence and self-awareness:** collaborating with others; treating everyone with respect.

### **In addition, as Finance Trustee you will need:**

- financial literacy, including experience of creating and managing budgets
- ability to interpret financial information and communicate it clearly, and
- strong analytical skills.

### **For this role, we also value:**

- experience of working in finance, accounting and/or audit
- experience in charity finance, SORP, or nonprofit financial management
- familiarity with financial software, and/or
- experience of Board or committee work.

Finally, **competent trustees** should have these **six personal qualities** to some extent, and demonstrate them in their behaviours:

- **Committed** - motivated, dedicated, persevering; plays an active role.
- **Responsible** - accountable, independent, reliable; accepts collective responsibility.
- **Trustworthy** - ethical, principled; is a critical friend and focuses on continuous improvement.
- **Collaborative** - team-oriented, approachable; builds relationships and seeks consensus.
- **Confident** - independent; contributes constructively and expresses opinions courageously.
- **Thoughtful** - curious, adaptable, open-minded; appropriately challenges the status quo.

(This section is based on our **Competency Framework for Trustees**, which defines the functions of the Board as a whole, the role of individual trustees, and the competencies that the Board and its members require to perform effectively.)



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

The Trustee Board usually meets in the evening, four times a year. There is an annual full- or half-day strategy meeting and a full-day all-hands meeting. These meetings are in person. Trustees also join one of our sub-committees, according to their interests. Each sub-committee meets four or five times a year, usually by video call. There will be some initial induction and training.

As Finance Trustee, you will also spend a total of 1-2 days per month supporting the finance team, remotely and in person.

Most trustees also take on a leadership role, guiding the charity in an area where they have experience or specialist expertise. You may also attend other meetings if you take part in projects, or meet with CASL volunteers and staff. There are occasional social events.



## **Valuing inclusion**

We particularly welcome applications from disabled people, people with physical or mental health conditions, LGBT+ and non-binary people, and people from Black, Asian and Minority Ethnic (BAME) communities.

If you would like to discuss flexibility in location, time, what you will do and how we can support you, please contact us (details below).

If you may need support during the selection process, please tell us when completing our Application Pack.

Some people are prohibited by law from becoming a trustee. During the application process, you will be asked about relevant factors, including unspent convictions, but this will not necessarily disqualify you from becoming a trustee.



## Contact details and next steps

After reading this pack,  
especially the **role description**,  
**if you:**

- can bring the necessary skills, knowledge and passion
- are available to be part of a committed Board of Trustees, and
- will enjoy the opportunity of supporting the communities we serve,  
then **we would love to hear from you.**

### **For further information or an informal discussion,**

please contact our Chair, Monica Stark, at  
[monica.stark@citizensadvicesouthlincs.org.uk](mailto:monica.stark@citizensadvicesouthlincs.org.uk)  
who can supply a copy of our **Trustee Application Pack**,  
if you do not already have it.

### **To apply,**

please complete the Trustee Application Pack:

- our short **Application Form**
- the **Trustee Skills Questionnaire**
- and a **Diversity Form** (for recruitment monitoring, **but not** for selection)
- and **add your CV**,

then send them to:

[monica.stark@citizensadvicesouthlincs.org.uk](mailto:monica.stark@citizensadvicesouthlincs.org.uk)

# Meet the trustees

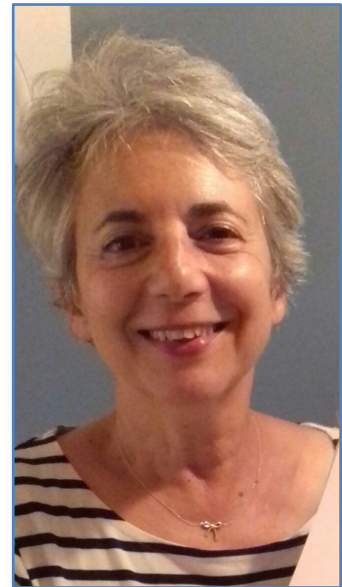
## Monica Stark – Chair of the Trustee Board

I grew up in North London and started my career as a teacher. I became Head of Business Development for NSPCC East in Leicestershire in 1991 and then Director of Fundraising & Communication for the national charity Home-Start UK.

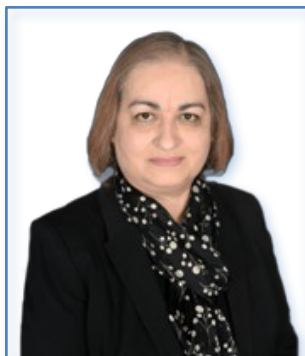
My most fulfilling role was as Chief Executive of Leicestershire Cares. This is an organisation of employers who want to get their employees to volunteer. I developed projects to address poor literacy and numeracy and to support vulnerable groups into work or training.

On retirement, I worked as a consultant supporting charities with their strategy, fundraising and governance.

I live in Oakham with my husband and have a son in South Witham and a daughter in London. At CASL, I also lead on business continuity, business development, leadership self-assessment and fundraising. I am also a trustee of Citizens Advice Lincolnshire. I love painting in watercolour and am a keen gardener and dog walker.



## Sameena Alladin – Trustee



Undertaking voluntary work is an important part of my life and my association with Citizens Advice has been a rewarding one, spanning more than 25 years. I began as a volunteer Advisor, a role I enjoyed thoroughly whilst a housewife. I have served as a trustee of three Citizens Advice charities. I am also a volunteer with the Gibberd Garden.

In my non-voluntary work, I am a solicitor, specialising in family law, and I am a Law Society-accredited All Issues Family Mediator. It is a continuing privilege to be part of an organisation that offers such excellent and much needed

support to our communities, endeavouring to improve the lives of those who often have nowhere else to turn for assistance.

I lead on Research and Campaigns.

## **Annie Butler — Vice Chair**

I am deeply rooted in our local community, where I reside with my husband and our children. Professionally, I have had a rewarding 35-year career, mainly in senior management roles in the financial services industry. Seven years ago, I started my own business, which has given me experience in leadership and problem solving.



My commitment to public service extends beyond my professional life. I recently served as a District Councillor in South Kesteven and enjoyed three years serving on the Cabinet with responsibility for People & Safer Communities. I am a current Trustee of Grantham Ark, a homeless charity, and a Member of Kesteven Girls Grammar School. This experience has given me valuable insights into the needs and challenges of our community.

The sense of purpose and well-being that comes from helping others has been a driving force for me. I chair the People sub-committee.

## **Jeremy Gibbs – Trustee**



Volunteering has been important to me throughout my working life, including as a trustee in human rights charities.

I spent most of the 2010s setting up a new university in London, as CEO. Before that, for 15 years I was a director of multiple companies, including an AIM-listed electronics manufacturer and chairing a US-listed software developer. In my early career, I led an IT organisation and managed large numbers of people in heavy engineering. I moved to Stamford in 2006.

I lead on complaints and trustee recruitment. I am also a trustee of Age UK Lincolnshire.

## Mark Hallewell – Trustee

I have extensive experience of financial services, including senior roles in debt collection, risk management and retail banking. I also spent five years in Public Policy at a UK bank, and three years as Senior Strategic Stakeholder manager at the Money Advice Service (now MaPS).

I and my wife moved to the area to be closer to our two sons and enjoy the wonderful countryside.



I joined Citizens Advice South Lincolnshire in December 2019, having worked with Citizens Advice in previous roles and seen the fantastic work they do for their communities. I lead on business development, GDPR and information assurance, and healthcare sector development. I chair the Finance and General Purposes sub-committee.

## Vicky Haw – Trustee



I grew up in North Nottinghamshire before relocating to Bourne, where I have been since 2004. I am lucky to have 2 children, one girl and one boy who are amazing!

I have worked in Food Retail for over 20 years in senior positions, leading large teams as well as being involved in future business strategy and operational execution. This is my first trustee role.

Making a difference to colleagues and customers is incredibly important to me at work, which is why I was keen to join Citizens Advice as a Trustee to make a difference more locally.

I worked for The Co-op for more than 20 years and I am now Head of Retail for Waitrose. I have lived in the area for over 15 years. I have a genuine interest in community support, particularly equality of access to support and breaking down barriers for disadvantaged groups.

I lead on equity, diversity and inclusion, and on health and well-being.

## Heather McLoughlin - Trustee

I grew up in Rutland and attended Stamford High School for Girls. I completed undergraduate and master's degrees at Trinity College, Dublin. My focus is on helping charities to understand governance and strategic needs.

I have worked for the Charity Finance Group, the Charities Aid Foundation, the Fundraising Regulator and the Motor Neurone Disease Association. I am currently Corporate Governance Manager at the Legal Services Board.



I began volunteering with Oakham First Brownies while in school. I was a Games Maker for the London 2012 Olympics and Paralympics. In 2015, I volunteered in Kenya with Voluntary Service Overseas, working to help internally displaced refugees to access government support.

I have recently moved back to Rutland and seized on the opportunity of becoming a Trustee with Citizen Advice South Lincolnshire. I am excited to be able to help support CASL to continue to deliver the amazing work they do for the local community.

I lead on governance, risk management and our risk register.

## Sue West – Trustee



I bring 20+ years' Human Resources and employment law expertise to the CASL Board of Trustees.

With a foundation of experience in large blue-chip organisations, I have spent the last 10 years supporting SMEs with their people management through my own consultancy.

I aim to champion and engage the wider workforce, including our volunteers, to ensure CASL continues to effectively deliver a range of advice needs across our region.

I lead on human resources and trustee recruitment.