citizens advice South Lincolnshire

# CHAIR OF THE BOARD RECRUITMENT PACK

*Help shape the future of our charity*

## Our Vision

A future where free advice is easily accessible to people in 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.

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 also use our knowledge and insight to campaign locally and nationally on issues that affect peoples' lives, influencing 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 support people face to face, on the phone and via email.  Our services are delivered by our 40-strong staff team, most of whom are part-time, and by 59 volunteers.

CASL is a member of the national Citizens Advice organisation, which celebrated its 85th anniversary in 2024. We are one of 274 independent charities operating under the Citizens Advice umbrella. We also collaborate with the two other Citizens Advice charities in Lincolnshire.

## Our Mission

CASL improves lives by providing free, confidential, impartial independent advice and challenges injustice.

Three local councils provide a significant proportion of our total 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 from government and other organisations 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

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. We are currently expanding our outreach across our region.

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

# A MESSAGE FROM OUR CHAIR

## Monica Stark

Chair of the Board

Thank you so much for your interest in the role of Chair of the Board of Citizens Advice South Lincolnshire (CASL). The opportunity to take on one of the most rewarding roles in Lincolnshire arises as I complete the permitted six-year term.

The work of Citizens Advice has never been more important and needed. Being privileged enough to hear first-hand from our clients how our work changes lives and can even save lives, has made the role so meaningful and vital.

Working very closely with the CEO to give support and advice, discuss plans and issues that may arise, has also been hugely rewarding as this shapes the service in a tangible way.

One of the most satisfying aspects of my tenure has been the shift to an emphasis of really valuing our staff and volunteers, thereby creating a culture of a happy team who feel supported and empowered.

Developing the service to ensure that we reach as much of this huge area as possible, has been exciting and I leave as the plans for this are firmly in place with the funding to do it.

It has also been very fulfilling to see the development of the Board. We welcome diversity in order to ensure that we represent the communities that we serve; we are now the most diverse Board that we have ever been.

Supporting the CEO to grow the funding base and develop all of our stakeholder relationships to make us secure financially, has also been a highlight and I leave with CASL in very good financial shape.

This is an exceptional chance to make a real impact in the communities across South Lincolnshire by leading an outstanding group of Trustees, staff, and volunteers. Joining now as we celebrate our 10th anniversary is an opportunity to take the charity to its next exciting stage.

I look forward to hearing from you.

# A MESSAGE FROM OUR CEO

**Steve Cheetham**

CEO

Every day at CASL, we see the difference that high quality advice can make by helping individuals and families navigate some of the most challenging moments in their lives. Whether that is someone facing debt, housing insecurity, employment issues or the rising pressures of the cost of living, the right support at the right time can change lives. That belief is at the heart of everything we do.

As we begin an ambitious new chapter, with a new three-year strategy, a refreshed governance structure being embedded, and a renewed focus on strengthening our impact across South Lincolnshire, we are looking for a Chair who shares our belief that good governance is ultimately about enabling people and communities to thrive. Building an effective and inclusive Board, fostering a constructive partnership with the executive team, and supporting a culture where staff and volunteers feel valued, supported and empowered to deliver their best work, remains a critical part of our focus.

The next Chair will play a defining role in shaping our next chapter, providing strategic leadership, building a strong and inclusive board, and ensuring that every decision we make remains rooted in the needs of the people and communities we serve. Together, we will strengthen our organisational culture, support our people, and ensure that the voices and experiences of those we serve continue to shape our direction and priorities.

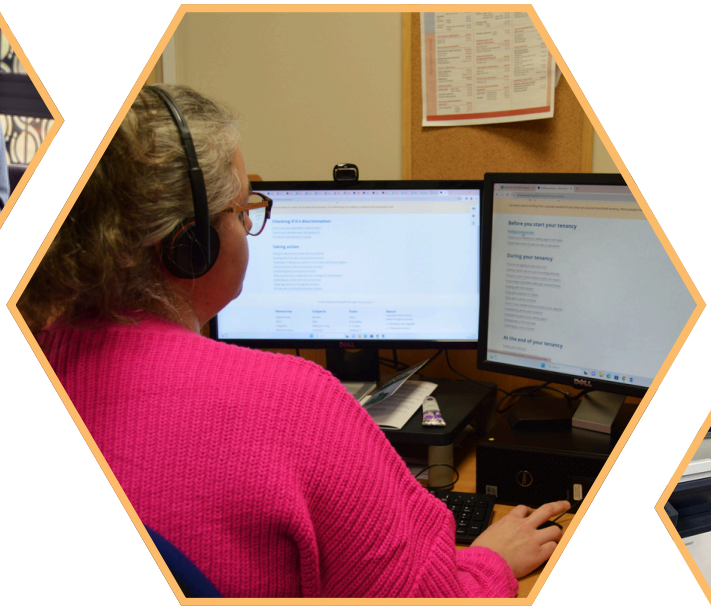
As CEO, I see every day the incredible dedication of our staff, volunteers and trustees, and the extraordinary impact they have across South Lincolnshire.

I am looking forward to working alongside a Chair who shares our ambition, our values and our determination to build an even stronger future for CASL. If that resonates with you, I hope you will consider joining us.

# WHY JOIN CASL?

It is an exciting and pivotal time to join CASL as our Chair. As we celebrate our tenth year of operation, we are reflecting on the significant achievements and impact we have delivered over the past decade. More importantly, we are looking ahead and considering how our experience and successes can shape and strengthen our future development.

CASL is in a strong financial position and has recently undertaken a comprehensive refresh of its governance and organisational structure. These changes have been carefully designed to ensure we are well prepared for future challenges and positioned to seize emerging opportunities.



This work is underpinned by our ambitious 2026–2029 Strategic Objectives and Business Plan, which focus on expanding our reach, refining our understanding of organisational impact, and strengthening how we measure and demonstrate the difference we make.

These developments present a unique opportunity for an ambitious and inspirational new Chair to help guide the organisation through its next phase of growth. Working alongside our dedicated and diverse team of trustees, staff and volunteers, the successful candidate will play a key role in shaping the future of CASL and maximising the positive impact we have within our communities.

# EVERY NUMBER TELLS A STORY

## OUR 2025-2026:

**9,586**
clients helped

**£1,115,232**
debt dealt with

**£6,397,691**
additional income gained for our clients

**31,493**
Issues dealt with

**3,544**
charitable support and food bank issues dealt with

# WHY YOUR WORK MATTERS

This is an exciting opportunity to play a pivotal role in the future success of CASL at a significant point in its development. As Chair, you will provide the leadership and direction needed to ensure the organisation remains well-governed, financially sustainable and focused on delivering meaningful outcomes for the communities it serves. Your contribution will help CASL translate its strategic ambitions into lasting impact, ensuring that the charity continues to respond effectively to changing community needs and opportunities.

The Chair's role is central to maintaining a strong partnership between governance and management, enabling the Board to provide both support and constructive collaboration while ensuring the charity remains true to its values, mission and purpose.

Beyond the Board, you will act as an ambassador for CASL, helping to build relationships that can strengthen the organisation's profile, influence and sustainability. By engaging with funders, partners, community leaders and stakeholders, you will help create opportunities that enable CASL to grow its reach and deepen its impact. For someone passionate about community development and effective charity leadership, this role offers a unique opportunity to make a lasting difference to the organisation and the people it supports.

# ROLE DESCRIPTION

The Trustee Board, led by its Chair, acts collectively to govern the charity. The Board has three key functions:

- setting the charity's direction through its strategy, business plan, budget and allocation of resources
- holding management to account and managing risk, including monitoring operational and financial performance, 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.

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

As a Trustee, you will:

- complete a structured and supported induction for the role, and regular training
- maintain awareness of how CASL is operating
- read papers for meetings and attend Board, sub-committee, and other meetings and events
- take an active part in Board discussions and work with other trustees to fulfil the Board's collective responsibilities, including:
- deciding policy and strategic direction, setting targets and evaluating CASL's performance
- monitoring CASL's financial position, ensuring that it operates within its means and objectives, that there is clear accountability for day-to-day management, that proper financial controls are in place and that the charity complies with regulatory and Citizens Advice membership requirements
- monitoring how the service meets the needs of the local community
- ensuring that the service plans its recruitment of staff and volunteers
- reviewing CASL's work and how effectively it operates, including actions for improvement.

In addition, the Chair:

- works closely with the CEO, providing regular 1-to-1 support, both formally and informally, including an annual appraisal and ensures their well-being
- plans Board meetings including dates and agendas with the CEO
- facilitates Board meetings by leading them, ensuring that agenda items are discussed, seeking clarification where necessary and enabling all members to contribute, ensuring consensus and collective responsibility with the decisions taken.
- ensures that Board decisions and agreed actions are carried out
- ensures that Board decisions are made within CASL's governing documents and policies and the Citizens Advice membership agreement
- leads Board evaluation and development
- may use delegated powers to take action if a particularly urgent decision is required
- monitors the attendance and commitment of other trustees
- arranges induction, training and support for trustees to fulfil their role
- with other trustees and the CEO, recruits a trustee board with a diverse range of skills, experience and knowledge, and promotes trusteeship to underrepresented groups that represent the local community
- proactively recruits successors to positions such as Chair and Treasurer
- together with the Treasurer, ensures proper management and control of CASL's finances
- together with the CEO, represents CASL in relationships with funders and potential funders, Citizens Advice Lincolnshire (meeting four times a year), national Citizens Advice and in the community

# PERSON SPECIFICATION

**We expect all trustees to have six core skills:**

**Weighing up opinions**
using evidence; balancing long- and short-term; prioritising value

**Interpersonal skills**
communicating clearly; listening actively; supporting a healthy culture

**Challenging constructively**
clarifying facts; stimulating thought

**Confidence and self-awareness**
collaborating with others; treating everyone with respect

**Insight into the organisation**
considering CASL's objects and its public benefit strategically

**Analysing issues**
being objective; evaluating risks; using evidence; planning ahead

**Trustees also need to:**

- understand and accept the responsibilities and liabilities that we all share as trustees
- be non-judgmental and respect views, values and cultures that may be different from their own
- be able to exercise good independent judgement
- be able 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.

**In addition, the Chair will:**

- have previous leadership, trustee or Board experience, ideally as Vice Chair or Chair
- be able to operate at Board level, and
- be confident in chairing and facilitating meetings, leading groups to reach consensus and using influencing skills to get results.
- have a demonstrable commitment to the values of Citizens Advice.

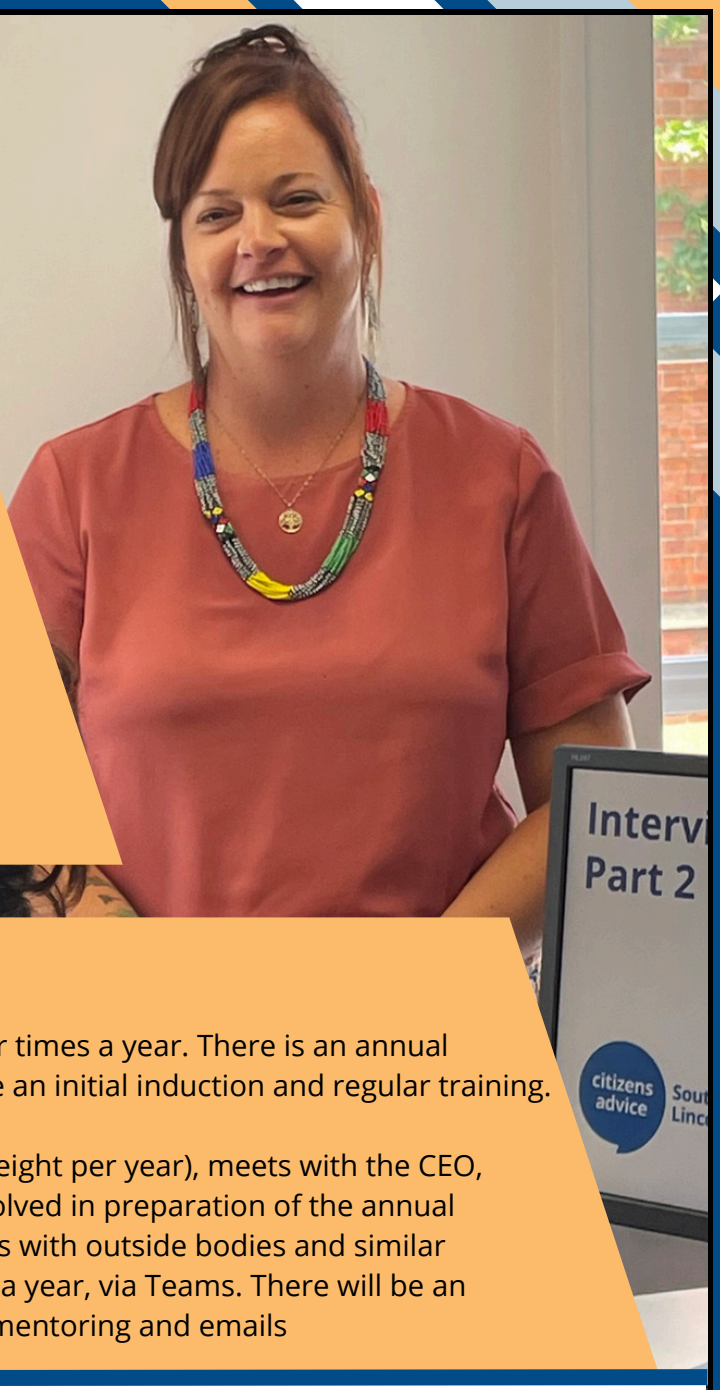
Experience of governance, risk management and/or performance oversight, and previous involvement in an organisation with a similar social impact would be advantageous.

**Remuneration and expenses**

The role of Chair is unremunerated as Trustees are unpaid volunteers, but we can reimburse expenses, in line with our expenses policy.

**Valuing inclusion**

Our volunteers come from varied backgrounds. Our trustees bring a wide range of knowledge, experience and skills. 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, to align with our clients' profiles.




**Time commitment**

The Trustee Board meets in the evening, in person, four times a year. There is an annual strategy meeting and a Stakeholder event. There will be an initial induction and regular training.

The Chair usually attends all sub-committee meetings (eight per year), meets with the CEO, other staff and volunteers on a regular basis and is involved in preparation of the annual business plan and leadership self-assessment, meetings with outside bodies and similar activities. Each sub-committee meets four or five times a year, via Teams. There will be an additional time commitment for meeting preparation, mentoring and emails

## HOW TO APPLY

If you:

- can bring the necessary skills, knowledge and passion
- are available to be part of a committed Board of Trustees, and
- would 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 at monica.stark@citizensadvicesouthlincs.org.uk

**To apply, please complete:**

- our Application Form
- a Diversity Form (which is not used for selection)
- a covering letter that demonstrates how you meet the requirements for the role
- your CV

**then send them to: monica.stark@citizensadvicesouthlincs.org.uk**
**Application Deadline: Friday 27th November 2026 (Interview details to be confirmed)**

# OUR TRUSTEES

Our Board of Trustees brings experience and knowledge in many areas including finance, governance, strategic management, HR, law, and fundraising. Their commitment to the charity is unwavering and they continue to work collaboratively with our CEO define our strategic direction.

**Annie Butler, Vice Chair, People Sub-Committee Chair**

With 35 years in senior management roles within financial services, Annie also has experience in running her own business. She served as a District Councillor in South Kesteven and enjoyed 3 years serving on the Cabinet with the responsibility for People & Safer Communities.

**Sameena Alladin, External Affairs Lead**

A solicitor, specialising in family law and mediation, Sameena's association with Citizens Advice spans more than 25 years; she started as a volunteer Advisor, and served as a trustee of three Citizens Advice charities.

**Jeremy Gibbs**

Jeremy brings a wealth of experience across a wide range of sectors including higher education and the corporate sector. Volunteering has been important to him throughout his life and he leads on Trustee recruitment.

**Sue West – HR lead and Trustee recruitment**

Sue brings over 20 years' Human Resources and employment law expertise to the Board. She has experience in large blue-chip organisations, and has spent the last 10 years supporting SMEs with their people management through her consultancy.

**Mark Hallewell, Chair Finance & General Purposes Sub-Committee**

Mark brings extensive experience of financial services, including senior roles in debt collection, risk management and retail banking Public Policy at a UK bank, and stakeholder management at the Money Advice Service (now MaPS).

**Vicky Haw, EDI and health and well-being Lead**

Vicky has worked in Food Retail for over 21 years in Senior Manager positions, leading large teams as well as being involved in future business strategy and operational execution.

**Heather McLoughlin, Governance Lead**

Heather brings extensive experience of helping charities to understand governance and strategic needs. She has worked for the Charity Finance Group, the Charities Aid Foundation and the Fundraising Regulator.

**John Brooker, Treasurer**

John utilises his background in finance to provide key insights and strategy to help develop the organisation.

**Oma Aniekwena**

Oma brings her background in adult social care, law and risk management to support good governance, effective board decision-making, and positive community impact. She has also previously volunteered to support her community.

## FIND OUT MORE ABOUT US:

If you want to learn more about our organisation, you can visit our website at: www.citizensadvicesouthlincs.org.uk or scan the QR code.

Please feel free to follow our LinkedIn and Facebook pages via the links on our website.

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