

Trainee Trustee Recruitment Pack

**citizens
advice**

**Derbyshire
Districts**

Thanks for your interest in joining us as a
Trainee Trustee. This document should give
you everything you need to know
about the role.

Welcome

A message from our Chair

Dorcas Bunton



Thank you for your interest in becoming a Trainee Trustee with Citizens Advice Derbyshire Districts. This is a unique opportunity to learn about charity governance and board-level leadership while supporting a vital organisation that helps people in our communities through some of the most challenging moments in their lives.

Every day, our staff and volunteers provide free, impartial advice to individuals facing hardship, crisis, or confusion about their rights and options. It's a service that has been making a difference for over 85 years. Our current Board of Trustees brings together people from a range of backgrounds, united by a shared commitment to fairness, inclusion, and support for those in need.

The Trainee Trustee role has been created to open up governance opportunities to individuals who may not have previous board experience but are keen to learn, contribute, and grow. You'll have the chance to shadow the board, attend key meetings, receive mentoring from experienced trustees, and develop your skills in a supportive and inclusive environment.

It's both a rewarding and eye-opening experience, one that allows you to play a part in shaping our future and giving back to your community in a meaningful way. We hope you'll consider taking this next step with us.

I hope we hear from you soon.

A message from our CEO

Chloe Doxey



We're proud to be part of a trusted national network, but our roots are firmly local. Since opening our first office in Glossop in 1939, we've supported people across our communities, whoever they are, whatever their problem.

Behind our vital frontline work is a dedicated Board of Trustees, working closely with our Senior Leadership Team to shape the organisation's direction and keep us resilient, forward-looking, and deeply connected to the communities we serve.

Our new Trainee Trustee role has been developed to open up governance to a broader range of people especially those who may not have considered board membership before. This is a chance to learn how a charity is led and governed, to gain valuable experience, and to contribute your voice, perspective, and ideas.

We're looking for individuals who are curious, committed, and passionate about fairness and access to justice. Whether you bring lived experience, community insight, or a strong desire to learn, this opportunity could be the first step in a meaningful journey into charity leadership.

The challenges facing our communities are real and growing but so is our determination to be there when people need us most.

If that speaks to you, we'd love to hear from you

About us

Citizens Advice Derbyshire Districts is a **local independent charity** that forms part of the national network of Citizens Advice.

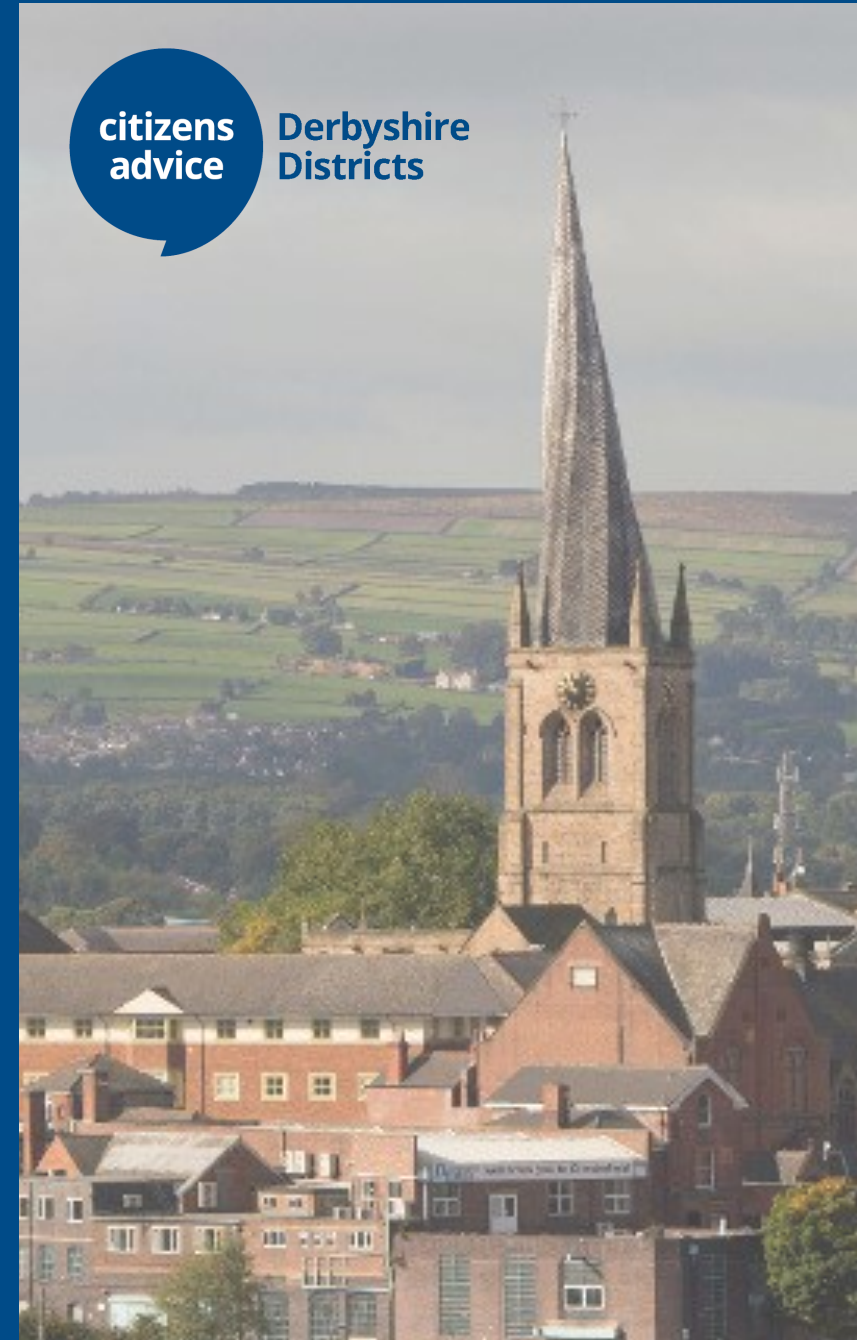
Our first office opened in Glossop in 1939 and we've been tirelessly working across the local community to help people ever since – **whoever they are and whatever their problem**. From benefits, housing, employment and consumer to debt, relationships, energy costs and more.

Our primary areas of focus are in **Amber Valley, Chesterfield, Derbyshire Dales, Erewash** and **High Peak**. Although we also provide some funded services across the East Midlands, and nationally through the Citizens Advice network.

We pride ourselves on being a **great place to work and volunteer**, we currently have 100 paid staff members, over 60 volunteers and 14 trustees.

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Our strategy

The Board of Trustees govern and help to **shape the long term future** of Citizens Advice Derbyshire Districts.

Our five year strategy is developed by our Board of Trustees and Senior Leadership Team, and it helps to set out the **goals** and **strategic objectives** which **influence** our annual operational business plan and **day to day activities**.

Our three main strategic objectives define our **organisational priorities, who we are, and what we do**.

Clients and Services

We will resource and deliver our services at a scale and intensity proportionate to the degree of need, ensuring we remain responsive to emerging trends. We will continue to drive performance through our Adviceline, whilst sustaining targeted face to face support for the most vulnerable.

Organisational Sustainability

We will maintain an agile leadership team which will enable us to seek out new opportunities and continue to curate a broad spectrum of funding for core advice services and targeted support projects. We will actively seek out new ways to engage and collaborate with key stakeholders and partner agencies that align with our values.

People and Culture

We will continue to be a high-quality organisation that values our people and consistently strives to be considered a great place to work and volunteer. We will continue to develop a culture of positivity, built on championing equity, diversity, inclusivity, and harmony in the workplace.

Our impact in 24/25



24,192
people helped



172,662
issues dealt with



18,041
Adviceline calls
answered



£31.5 million
income gained



£6.8 million
debts resolved



**Thank you for
everything you
have done for my
husband and I,
your help has been
invaluable**

- client



The Trainee Trustee Role

Background and rationale

To build a board that truly reflects the diversity of the communities we serve, we're introducing a **Trainee Trustee Programme**. This offers aspiring trustees the chance to "learn on the job" in a supportive environment. It's designed for individuals **who may not yet have board experience** but are keen to get involved in governance, contribute their knowledge and perspectives, and gain new skills and experience.

Training and development

You will receive a **tailored development plan**, including an induction covering the responsibilities of charity trustees, based on the Charity Commission's guidance. Most learning will be self-directed but supported by **structured resources** and observations. This hands-on approach provides **valuable insight** into how decisions are made and how the charity is run at board level.

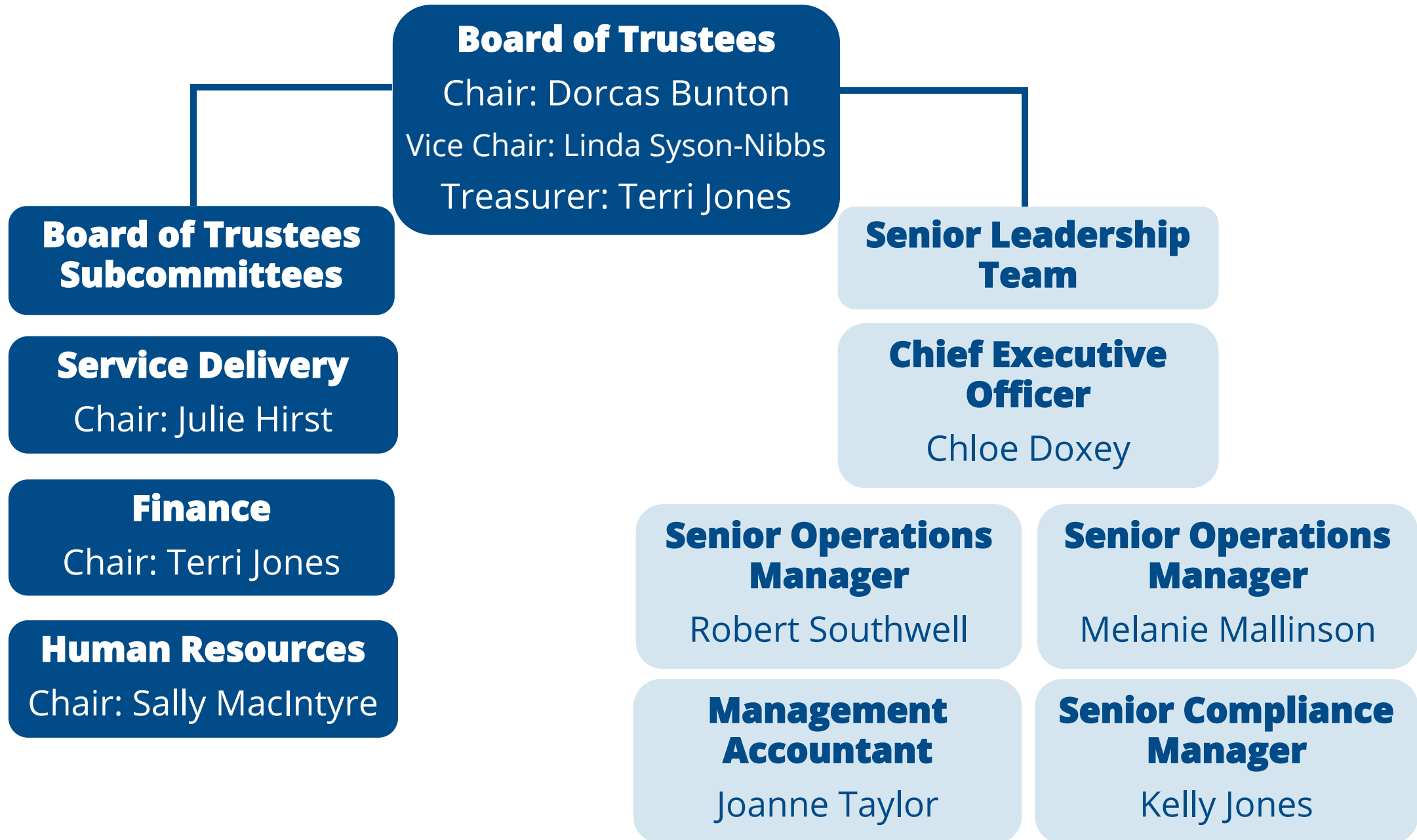
Mentoring and support

You will be matched with a **Trustee Mentor** for ongoing support throughout the programme. You'll also have access to sessions with sub-committee chairs and the Senior Leadership Team, providing a deeper understanding of our work and governance. This support is designed to **build confidence**, encourage reflection, and help you **find your voice** in the boardroom.

Future opportunities

The role is a **voluntary fixed-term position lasting one year**. At the end you should have a clear insight into the role of a trustee and may choose to **apply for a full trustee position** with us. You will come away with **transferable skills and valuable experience** that can support future opportunities in governance/ leadership, both within the charity sector and beyond.

Governance structure



Our subcommittees

Service Delivery

Aligned with our 'clients and services' strategic objective, our Service Delivery Subcommittee monitors things such as:

- Organisational performance
- Project design, development and delivery
- Outcomes and outputs
- Accessibility of services
- Client satisfaction

Finance

Aligned with our 'organisational sustainability' strategic objective, our Finance Subcommittee monitors things such as:

- Management accounts and budgets
- Financial procedures and risk
- IT, cyber security and technology
- Reserves and cashflow
- Fund raising

Human Resources

Aligned with our 'People and culture' strategic objective, our Human Resources Subcommittee monitors things such as:

- People management
- Equity, Diversity and Inclusivity (EDI)
- Health and safety
- Recruitment and retention
- Training and development

EDI Steering Group

The group is made up of trustees, staff and volunteer EDI champions. The group makes recommendations to the Human Resources Subcommittee on things such as:

- EDI policies, procedures and processes
- Accreditations, schemes and programmes
- Updates on legislation and best practice
- Improvements to support staff, volunteers or clients

What will I learn about?

As a Trainee Trustee you will learn about the vital role trustees play in the governance of our organisation and develop the skills, knowledge and experience required to become a trustee in the future. Our Board of Trustees is collectively responsible for the overall management, governance and strategic direction of the charity. Below you will see an overview of the key responsibilities and functions of the trustee role.

Fundamental responsibilities of a trustee:

Setting strategy

Set the long-term vision and strategic direction of Citizens Advice Derbyshire Districts in the long term best interests of the service's clients.

Financial and performance oversight

Provide oversight of finances, risk, and performance, ensuring the long term sustainability of the charity and service.

Ensuring accountability

Being open to challenge and questioning from the wider organisation, listening and consulting as appropriate and ensuring strong accountability from the Senior Leadership Team.

Legal obligations

Ensuring that the charity complies with its charitable objects at all times, and with the law more generally.

Leadership

Building strong relationships with the Senior Leadership Team, staff, volunteers, National Citizens Advice, regulators and wider stakeholders. Demonstrating Citizens Advice values in behaviour and decisions.

Setting and ensuring standards

Upholding the Membership Agreement by ensuring the performance quality frameworks hold the organisation to high standards and all regulations and standards are met.

Equity, Diversity and Inclusion (EDI)

Ensure all decision-making is informed by principles of equity, diversity and inclusion and ensuring our work is informed by diverse voices and lived experiences.

What's in it for you

Being a Trainee Trustee is a voluntary role, so it is important that you feel the benefit of giving away your time, knowledge and skills for free. These are just some of the benefits of becoming a trainee trustee with us:

Learn skills to boost your career prospects

Trustees are exposed to a wide range of skills needed to oversee a charity: strategy and business planning, governance, HR, finance, marketing, fundraising, and more. It can be an effective way to build your skills and your CV. We will offer you a bespoke training plan to learn on the job, with the aim of becoming a fully recognised member of our board of trustees.

Meet and learn from new people

You'll get to build relationships with our experienced trustees, as well as our Senior Leadership Team, and our wider team of staff and volunteers.

Influence change for everyone

Equity, diversity and inclusion (EDI) is integral to all we do as a service, not only for the people we help, but also for our volunteers, staff and trustees. We are constantly evolving as an organisation and your perspective and lived experience could help to influence positive change.



Who we are looking for

We believe everyone has something **unique to share**, this trainee role has been developed as part of our commitment to EDI, to ensure our board is **reflective and representative** of our local communities and workforce. We strongly encourage applications from under-represented communities and are currently seeking to **increase the involvement of people under the age of 35, people with a disability, people of colour and/or LGBT+ people** on our Board of Trustees.

This role is intended as a training and development opportunity, therefore previous governance experience and/or leadership skills are not required.

Your skills, abilities and personal qualities

- Willingness to learn and develop knowledge of the role of a Trustee including governance, finance, risk management and strategic planning
- Commitment to be reliable and accountable for the duration of the programme
- A connection to the local area e.g. live, work or study in Derbyshire
- Lived experience and/or understanding relevant to our advice work and the communities we support
- Commitment to our strategic aims and values, with an appreciation of EDI
- Strong interpersonal skills and the ability to work collaboratively
- Understanding of the importance of confidentiality when handling sensitive information
- Integrity, authenticity and the ability to act impartially and fairly at all times
- Empathetic, passionate and ambitious
- Proficient IT skills

What will be expected of me?

As a Trainee Trustee your role will involve shadowing our trustees and attending our meetings. Although you won't be a Trustee with voting rights, the role will require the same level of commitment, set out below:

Time Commitment

You are expected to contribute between 10 and 14 days per year. This will include:

- Trustee Board meetings of which there are typically four a year, together with one strategic leadership day. These meetings are held in person, though online attendance may be possible.
- An active role in at least one subcommittee, which also typically meet four times a year.

Location of meetings

You must be willing to travel to attend the in person meetings, which are typically held in our Matlock Office located at the Town Hall. Meetings are usually held in the evenings between 4pm-6pm. Expenses will be paid.

Training requirements

You are required to commit to a mandatory online compliance training plan. As a Trainee Trustee, a formal training and development plan will also be provided.



How to apply

We hope you will consider making an application to join us as a Trainee Trustee at Citizens Advice Derbyshire Districts.

To apply, please complete the online form found on our website here: [**\[citizensadvice Derbyshire Districts.org.uk/trustee/\]\(https://citizensadvice Derbyshire Districts.org.uk/trustee/\)**](https://citizensadvice Derbyshire Districts.org.uk/trustee/)

If you would like to talk to someone informally about the role before making an application, please email us at: **governance@ddcab.org.uk**

If you have a disability and identify any barriers in the role description, person specification or application process, please tell us.

We would also be grateful if you would complete the diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

Closing date: When suitable candidates are found
Interview date: TBC

