**Citizens Advice Hull & East Riding**

**Trustee Application Form**

We will use the information provided on this form to assess the skills, experience and interest of those people who have applied to become a Trustee. It will help if you can be as specific as possible on, for example, your reasons for wanting to become a Trustee and what skills and experience you will be able to bring to the role.

**Personal details**

|  |  |
| --- | --- |
| **Surname:** | **First Name:** |
| **Address and postcode:** | |
| **Email address:** | **Contact telephone numbers**  **Day:**  **Evening:** |
| **Preferred method of contact:** | |
| **Please tell us how you heard about this vacancy:** | |

**Trustee volunteer role, skills and experience**

|  |
| --- |
| **Please explain why you are interested in becoming a Trustee of Hull and East Riding Citizens Advice.** |
|  |
| **Please give details of any experience, skills or training that you will bring which you consider may be relevant to the role of a Trustee (whether through paid employment or voluntary/participatory activities).** |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | Legal knowledge |  |  | Financial management |  | | Equality and diversity |  |  | Fundraising |  | | Managing premises |  |  | Marketing & Communication |  | | Digital & Information Technology |  |  | Human Resources / Personnel |  |   **Use the space below to provide additional information:** |
| **Is there anything else you would like to say about yourself that is relevant to this application?** |
|  |
| **Some people are disqualified by law from acting as trustees, including anyone described in Section 72(1) of the Charities Act 1993.** |
| |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | **Have you ever been? YES NO**   |  |  |  | | --- | --- | --- | | The subject of an application for disqualification order under the Company Directors Disqualification Act 1986 or had such an order made against you |  |  | | Adjudicated bankrupt or been the subject of a petition for bankruptcy |  |  | | Entered into an individual voluntary arrangement under the Insolvency Act 1986 or any composition or moratorium on debts with creditors |  |  | | Been convicted of an indictable or other offence which is not spent |  |  | | Been removed from the trusteeship of a charity by the court or the Charity Commissioners |  |  | | |
|  |
| **If yes to any of the above, please provide details below:** |
|  |
| **Are there any specific needs you would like us to take into account, either if we arrange**  **to meet with you or on you becoming a Trustee? Eg mobility needs or days/times you**  **would not be available. This information will be treated as strictly confidential.** |
|  |

**References**

Please give the names and addresses of two people, other than your family, who we can contact for a reference.

|  |  |  |
| --- | --- | --- |
|  | **Referee 1:** | **Referee 2:** |
| **Name:** |  |  |
| **Address and postcode:** |  |  |
| **Email address/contact telephone number:** |  |  |
| **In what capacity do they know you:** |  |  |

|  |
| --- |
| **Declaration –**  All the information I have provided above is accurate to the best of my knowledge |
| Signed: Date: |
| **Data Protection Act 1998**  **As part of the recruitment procedure we may collect and store sensitive personal data about you. We are required by law to obtain your consent to such date being recorded. It is our policy to store date relating to recruitment procedures for up to a year after the date on which it is submitted. Any information of this nature will be treated confidentially. Sensitive personal data is defined as information relating to any of the following: racial or ethnic origin, political opinions, religious beliefs, trade union membership, health, sexuality or sex life, offences and/or convictions.**  **For the purposes of the Act the Data Controller is Lesley Thornley, Chief Executive at Hull and East Riding Citizens Advice.**  I give my consent to sensitive, personal information being recorded and stored. |
| Signed:                                                               Date: |

**Please return this form to:**

**Email:** [**lesley.thornley@hull-eastridingcab.org.uk**](mailto:lesley.thornley@hull-eastridingcab.org.uk)

**OR**

**Post:** Citizens Advice, The Wilson Centre, Alfred Gelder Street, HULL, East Yorkshire, HU1 2AG

**Hull and East Riding** **Citizens Advice Trustees Skills Audit**

This questionnaire allows potential Trustees to self-assess their current capabilities in areas relevant to their role as a Trustee. It also enables Citizens Advice to identify any gaps in knowledge and skills that need to be filled by recruiting new Trustees for the service.

It is unlikely that any individual will have all the skills and knowledge listed below. Effective Trustee boards contain members with a range of skills and knowledge and it is the combination of these and of the different individual perspectives that determines the board’s effectiveness.

We would be grateful if you could complete this questionnaire and return it with your application.

Your Name: ………………………………….

Address:…………………………………………………………………………………………………………

……………………………………………………………………………………………………………………

Telephone No:………………………………..

E-mail:…………………………………………………………………………………

|  |  |  |  |
| --- | --- | --- | --- |
| **Area** | **Significant experience & knowledge** | **Limited experience/knowledge** | **Little/no experience or knowledge** |
| Setting aims & objectives |  |  |  |
| Devising a mission statement |  |  |  |
| Formulating policy |  |  |  |
| Setting priorities |  |  |  |
| Strategic planning |  |  |  |
| Monitoring progress |  |  |  |
| Reviewing work |  |  |  |
| Working as a team |  |  |  |
| Group work skills |  |  |  |
| Chairing |  |  |  |
| Taking minutes |  |  |  |
| Setting agendas |  |  |  |
| Legal knowledge |  |  |  |
| Commissioning services |  |  |  |
| Procurement processes |  |  |  |
| Contract negotiations |  |  |  |
| Managing contracts for service delivering |  |  |  |
| Performance management |  |  |  |
| Change Management |  |  |  |
| Organisational development |  |  |  |
| Customer Care |  |  |  |
| Analysing skills |  |  |  |
| Equal opportunities |  |  |  |
| Insurance |  |  |  |
| Managing premises |  |  |  |
| Financial management |  |  |  |
| Budgets |  |  |  |
| Cash flow |  |  |  |
| Investment |  |  |  |
| Business planning |  |  |  |
| Fundraising |  |  |  |
| Negotiating grants |  |  |  |
| Finding new donors |  |  |  |
| Fundraising & events |  |  |  |
| Marketing |  |  |  |
| Liaising with the media |  |  |  |
| Local government |  |  |  |
| Central government |  |  |  |
| Lobbying & campaigning |  |  |  |
| Promotion & PR |  |  |  |
| HR |  |  |  |
| Training |  |  |  |
| Knowledge of the community |  |  |  |
| Knowledge of the needs the CAB exists to meet |  |  |  |
| Networking and developing partnerships |  |  |  |
| Governance |  |  |  |
| Understanding of voluntary sector |  |  |  |
| Conflict resolution |  |  |  |
| Managing volunteers |  |  |  |
| Understanding field of work |  |  |  |

**Diversity Monitoring Form**

|  |  |
| --- | --- |
| **Applicant ref. number**  **(local Citizens Advice use only):** |  |
| **Which volunteer role are you applying for?** | **TRUSTEE** |

**Age**  
Which age bracket do you fit into? Put a cross in the relevant box.

|  |  |  |  |
| --- | --- | --- | --- |
| Under 25 |  | 55 - 64 |  |
| 25 - 34 |  | 65 and over |  |
| 35 - 44 |  | Prefer not to say |  |
| 45 - 54 |  |  |  |

**Gender**  
What term best describes your gender? Put a cross in the relevant box or write in a preferred term.

|  |  |
| --- | --- |
| Female |  |
| Male |  |
| I prefer to use another term. Please write in: ……………………………………... |  |
| Prefer not to say |  |

**Sexual orientation**  
What is your sexual orientation? Put a cross in the relevant box or write in a preferred term.

|  |  |  |  |
| --- | --- | --- | --- |
| Heterosexual/Straight |  | Bisexual |  |
| Gay Man |  | I prefer to use another term. Please write in: ………………………………………. |  |
| Gay Woman/Lesbian |  | Prefer not to say |  |

**Ethnic origin**  
How would you describe yourself? Choose **one** section (A to E) and put a cross in the relevant box within it.

|  |  |  |  |
| --- | --- | --- | --- |
| **A.  White** | English/Welsh/Scottish/Northern Irish/British |  | Any other White background  Please write in………………………………………. |
| Irish |  |
| Gypsy or Irish Traveller |  |
| **B.  Mixed/multiple ethnic groups** | White & Black Caribbean |  | Any other Mixed/multiple ethnic background  Please write in………………………………………. |
| White & Black African |  |
| White & Asian |  |
| **C.  Asian/Asian British** | Indian |  | Any other Asian Background  Please write in………………………………………. |
| Pakistani |  |
| Bangladeshi |  |
| Chinese |  |
| **D. Black/African/ Caribbean/Black British** | African |  | Other Black/African/Caribbean background  Please write in………………………………………. |
| Caribbean |  |
| **E. Other ethnic group** | Arab |  | Any other ethnic group  Please write in………………………………………. |
| **Prefer not to say** |  |  |  |

**Disability –** Do you consider yourself to be a disabled person as defined under the Equality Act 2010 (i.e. someone with a ‘**physical or mental impairment which has a substantial and long term adverse effect on that person’s ability to carry out normal day-to-day activities**.’

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Yes |  | No |  | Prefer not to say |  |

*The information on this form is for monitoring purposes only. If you require any reasonable adjustments to be made in the recruitment process or at work subsequently if appointed, please make sure you tell us separately from this form.*

**Religion or belief -** Which group below do you most identify with? Put a cross in the relevant box.

|  |  |  |  |
| --- | --- | --- | --- |
| No religion |  | Jewish |  |
| Christian (including all denominations) |  | Muslim |  |
| Buddhist |  | Sikh |  |
| Hindu |  | Prefer not to say |  |
| Any other religion or belief.  Please write in………………………………………. | |  | |