

A photograph of two women sitting and talking. The woman on the left has dark curly hair and is wearing a blue top, smiling broadly. The woman on the right has short grey hair, wears glasses and a pink top, and is also smiling. They appear to be in a bright, indoor setting with a window in the background.

**citizens
advice**

**South
Warwickshire**

Candidate Information 2025

Trustee Treasurer

**Trustees
Unlimited**



A message from the Chair

I am delighted that you are interested in becoming Treasurer of Citizens Advice South Warwickshire and a key member of our Trustee Board.

As part of a national network of Citizens Advice offices, we work to make society fairer by helping our clients find a way forward whatever individual problems they may be facing. We do this through our core advice services, available by telephone and email, and through all of our projects which are funded by a range of local bodies. We also help to champion change at a local and national government level through our research and campaigning work.

The last few years have seen a massive change in how we deliver our vital services to the people in South Warwickshire. We have invested in our telephone Advice Line with our partners in BRANCAB, (Bedworth, Rugby and Nuneaton) and North Warwickshire Citizens Advice, thanks to funding from Warwickshire County Council, and now take many calls directly from the public - over 1000 a month. This means we can often meet advice needs over the telephone, freeing up vital face-to-face services at our drop-in services in Leamington Spa, Stratford District Council offices, and through our outreach locations.

We have recruited more volunteers, and can train and support them efficiently to deliver on the telephone and then face-to-face, which is the cornerstone of the Citizens Advice model. We are committed to ensuring our services are accessible and open to everyone who needs us. More and more people are facing hardship, whether that be through the current cost of living crisis, unemployment issues, debt and benefit challenges, housing and food or fuel poverty.

We are a committed and talented team on the Board with various skills and experiences, focussing on our strategic direction and the oversight of risk. We work closely with our CEO and Senior Management Team who also have significant experience. In addition to your Trustee role, as Treasurer you will be key to supporting our strategic decision making with your financial acumen and to under-writing the long-term success of CASW, at a time when there are many potential hurdles facing the charity sector especially in our area.

I look forward to receiving your application.

Best Wishes,
Irene Stark

About us

Citizens Advice South Warwickshire is a local charity offering free, confidential, and impartial advice to anyone who needs it.

Whether it's a simple question or a complex situation involving multiple issues, we're here to help.

Every year, we support thousands of people across South Warwickshire — including Warwick, Kenilworth, Leamington Spa, Stratford-upon-Avon, and surrounding villages — to find a way forward.

Our friendly, community-based team offers a wide range of services: from signposting and general advice to specialist support in areas like debt and housing. Help is available in person, by phone, online, and in some cases, through home visits.

We believe in empowering people through advice, education, and support — and by influencing policies that affect our clients. Everything we do benefits not just individuals, but the wider community.

Our Values

- We are a **COMPASSIONATE COMMUNITY**
- We are **ACCOUNTABLE** to our clients, our funders and to one another
- We exist to provide a **SERVICE**
- We are **ONE TEAM**

Our Projects

With the generous support from local councils, charitable trusts, and foundations, we have successfully developed a variety of specialist projects. These initiatives play a crucial role in enhancing our services, ensuring that those in need within our community can access the help and support they require. [See more here.](#)

Our funding

Our funding comes from a wide range of sources, including Warwickshire County Council, Warwick and Stratford District Councils, and several town and parish councils, through direct grants and commissioned contracts. We also secure additional income from major grant and project funders such as the Big Lottery Fund, Henry Smith Trust, Oken Trust, Orbit Housing, and the Money Advice Service, among others.

Our local Research and Campaigns (R&C)

Client stories give us valuable insight into the challenges faced by people in South Warwickshire, helping us to identify emerging trends, shape campaigns, and represent our clients to decision-makers. By raising issues nationally, we spark public debate, drive change, and support many more people beyond those who contact us directly.



Our people

Our Trustees

We're proud to have a dedicated and highly effective Board of nine Trustees who bring a wealth of professional expertise, local knowledge, and insight to our organisation. Working closely with our CEO, the Trustees set the strategic direction and budget for our service, ensuring we continue to meet the needs of our community. Led by our Chair, Irene Stark, this talented team of volunteer Trustees contributes an exceptional range of experience and perspective to guide our strategy and decision-making.

Our staff and Volunteers

Citizens Advice South Warwickshire is led by our CEO, Julie Robinson, supported by the Operations, Targeted Services, Telephony, and Quality & Compliance Managers, who together oversee a dedicated team of 28 FTE staff delivering high-quality advice and support.

They're joined by over 58 passionate volunteers in roles ranging from reception and administration to advice, money guidance, research, and IT support — with new volunteers joining our training programmes regularly.

Our Location

We operate from two main locations: Hamilton Terrace in Leamington Spa, home to our Advice Line Telephony Hub and training base, and Elizabeth House in Stratford-upon-Avon. We're also expanding our community venues for face-to-face advice and offer a unique home visiting service for those unable to reach us.



Our 2023/2024



8,448 Clients helped



10,114 cases were opened to facilitate services for our clients



31,631 activities were completed by our staff and volunteers



£9,284,760 total financial gain for clients



£263,138 of debts written off



57 Volunteers helped give advice and support, alongside staff members



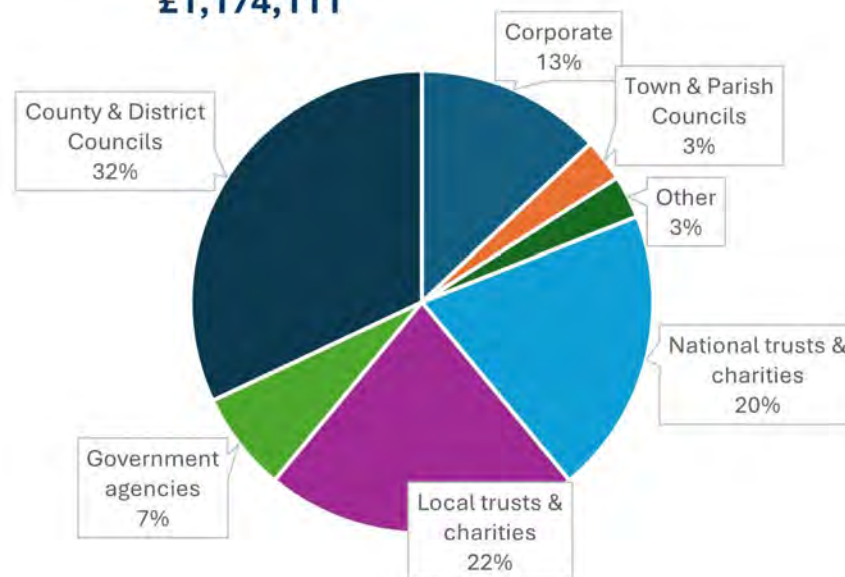
£82,891 of the financial income came from charitable grants and assistance



Clients sought our help with 39,391 issues including:

- Benefits & Tax Credits
- Debt
- Housing
- Financial Service & Capability
- Universal Credit
- Utilities & Communications
- Charitable Support/Food Banks

Income 2023/24
£1,174,111



The role

Role title:	Trustee Treasurer
Time Commitment:	c. 1-2 days per month (6 Board meetings and 6 Finance Sub Committee meetings per year)
Location:	Hybrid & Leamington Spa
Remuneration:	This is a voluntary role, with reasonable expenses paid

This is a fantastic opportunity to join an effective and passionate Board of Trustees who work together with respect, energy, and purpose. Our Trustees collaborate constructively and share a genuine commitment to making a difference. With CASW in a strong financial position, there are plenty of opportunities to shape our future strategy. It's an inspiring time to get involved — a chance to make a real impact and see the value of your contribution.

Key responsibilities

- To advise on the financial implications of the charity's strategic plan, including overseeing the charity's financial risk management process.
- To work with the CEO and the Finance Manager on the presentation of budgets, internal management accounts and annual financial statements to the Board of Trustees.
- To ensure that at a Board level, proper accounting records are kept, and that appropriate accounting procedures and controls are in place.
- To monitor and advise on the financial viability of the charity.
- To ensure investments and assets are maximised
- To keep the Board informed about its financial duties and responsibilities and develop the financial understanding of the Board of Trustees.
- To ensure that CASW is operating in line with contractual and funding requirements, offering advice and support to achieve charitable objectives.
- To maintain good governance of the charity in line with legal and contractual obligations, including our Articles of Association and Charity Commission best practice.
- To Chair the Finance Sub Committee



Person Specification

We're looking for someone who can commit the time and energy to make a real difference in South Warwickshire — a passionate team player with strong strategic insight and commercial acumen. You'll bring excellent communication skills and the ability to translate complex financial information into clear, accessible insights that support effective decision-making.

Essential:

- Passion and commitment to Citizens Advice South Warwickshire's mission and strategic objectives
- Recognised professional accounting qualification (e.g. ACA, ACCA, CIMA)
- Experience of successfully dealing with strategic issues, interpreting complex information and business planning
- A demonstrable commitment to diversity and inclusion

Desirable:

- Experience of serving as a Trustee or Treasurer, or working within the charity sector
- Knowledge of the regulatory requirements around financial discipline and reporting relating to charities



How to apply

If you'd like to join the board of this brilliant charity, please provide the following with your application:

- An up to date CV, with details of two referees (we won't contact them without your prior consent)
- A short supporting statement which addresses how you meet the criteria, and outlines your motivations for applying

Please send all applications to our recruitment partner, Trustees Unlimited: **applications@trustees-unlimited.co.uk**

If you would like an informal discussion about the role, please contact Melissa Baxter on:
melissa.baxter@trustees-unlimited.co.uk / 07789 985229

Closing date for applications: Monday 24th November 2025

Interviews with Citizens Advice South Warwickshire: Thursday 11th December 2025

