



Citizens Advice Bristol

Chief Executive Officer
Appointment Brief
September 2021

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Welcome from the Chair of Trustees and Chair-Designate

Welcome

Dear Applicant,

Thank you for your interest in applying to become the Chief Executive Officer of Citizens Advice Bristol (CAB). Our organisation has a remarkable record of over 40 years' service to the people of Bristol, working with a wide range of partners in the city to ensure that clients have access to the advice they need.

Our current Director has made a significant impact during her 10-year tenure, and the Board is now seeking a new Chief Executive Officer who can lead the organisation confidently into the next phase of its development. This exciting role offers the right candidate the opportunity to play a central role in the future success of CAB.

This is a demanding but extremely rewarding role, leading a large, dedicated team of volunteers and expert paid staff and securing the resources needed to provide an excellent advice service. In the last 18 months, due to the constraints imposed by Covid19, our service has rapidly adapted to the challenge of providing advice in new ways. The new CEO will be consolidating those changes and further developing the service.

CAB has a progressive and inclusive culture that values the talents and the energy of each member of the staff and volunteer team. As CEO, you would work with an amazingly committed and talented group of individuals in a dynamic, and at times challenging, environment, where the breadth of responsibilities means that no two days are ever the same. The CEO is also supported by a dedicated Trustee Board that offers considerable flexibility and independence of thought and operation.

This is a period of change for us, with new senior staff, several relatively new Trustees, and a new Chair taking over the role in 2022. Our new CEO will be a person who relishes leading through change and is excited about the opportunity to influence CAB's future.

For more background on our organisation, do look at our website, www.bristolcab.org.uk

If you have questions, please do not hesitate to email Philip Parry, Vice-Chair of the Trustee Board, philip.parry@citizensadvicebristol.org.uk. Sue Evans, the current Director, is also happy to be contacted, director@citizensadvicebristol.org.uk

We hope that you are excited by this opportunity and look forward to receiving your application.

Lois Thorn, Chair of Trustees

Robin Geller, Chair Designate

About us

General

Citizens Advice Bristol is an independent local charity that works in partnership with a wide range of agencies across the city of Bristol. We are a member of the national Citizens Advice network – one of around 300 independent local Citizens Advice charities. We provide free, independent, impartial and confidential advice to around 9,000 people each year, helping our clients to find a way forward with a range of problems including accessing welfare benefits, managing debt, and resolving employment, consumer, family relationship and housing issues.

Located in central Bristol, our core advice services are provided by a team of up to 65 volunteers and a team of about 45, mainly part-time, paid staff, most of whom are specialists in various areas of advice. Currently, we offer specialist services for debt, support to people with welfare benefits including Universal Credit, housing issues, and advice to those suffering with long-term illness. Our advice-facing roles operate across different channels to broaden our reach including webchat, email and telephone in addition to face-to-face appointments at our head office and in several health centres across the city. The service has been operating remotely during the Covid pandemic and we envisage that our future operating model will include a blended service of remote and in-person advice. We also work locally and with the Citizens Advice national network to use the evidence from our clients to inform, influence and change policy and practice.

Our Trustee Board works with the Chief Executive to develop our strategy and ensure that the organisation operates in keeping with its core purpose and values and in accordance with good governance.

Our values

- We're inventive. We're not afraid of trying new things and learn by getting things wrong. We question every idea to make it better and we change when things aren't working.
- We're generous. We work together, sharing knowledge and experience to solve problems. We tell it like it is and respect everyone.
- We're responsible. We do what we say we'll do and keep our promises. We remember that we work for a charity and use our resources effectively.

3 things you should know about us

1. **We're local and we're national.** Citizens Advice have 6 national offices and offer direct support to people in around 300 independent local Citizens Advice services – like the one in Bristol – across England and Wales.
2. **We're here for everyone.** Our advice helps people solve problems and our advocacy helps fix problems in society. Whatever the problem, we won't turn people away.
3. **We're listened to** – and we make a difference. Our trusted brand and the quality of our research mean we make a real impact on behalf of the people who rely on us.

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 300 local Citizens Advice members.

This role sits our network of independent charities, delivering services from

- over 600 local Citizens Advice outlets
- over 1,800 community centres, GPs' surgeries and prisons

They do this with:

- 6,500 local staff
- over 23,000 trained volunteers

Our reach means 99% of people in England and Wales can access a local Citizens Advice within a 30 minute drive of where they live.



Job description

- Job title:** Chief Executive Officer
Accountable to: Chair and Board of Trustees
Responsible for: Leading and directing all aspects of Citizens Advice Bristol

The role

As Chief Executive Officer you will have overall executive leadership for Citizens Advice Bristol, working with the management team and the Trustee Board to devise and implement strategic and operational plans. This is an exciting time to be taking over the reins at Citizens Advice Bristol as we develop a new operating framework that reflects the needs of our communities. The new Chief Executive will help to design and deliver a new advice framework which will build on our experience and learning of the past year to meet client needs, emerging demands and to support a sustainable service. The Chief Executive is supported by a talented and dedicated team of staff and volunteers and benefits from a significant degree of autonomy in carrying out the role.

Role profile

The role of the new Chief Executive includes the following:

Strategic responsibilities

- Work with the Board, staff and volunteers to design and deliver the Strategic Development plan and provide regular progress reports to the Board.
- Remain current with changes in the external environment, such as legislative developments, social trends, funding opportunities and local needs, that are likely to affect Citizens Advice Bristol.
- Support and advise the Trustee Board, including arranging and attending meetings and providing regular reports .

Financial and risk management

- Maintain financial control of the service within budget heads agreed by the Trustee Board.
- Ensure that all financial and payroll processes adhere to approved financial procedures and within mandates as agreed.
- Oversee the preparation of budgets, accounts and financial statements in conjunction with the Treasurer and relevant financial administrator.
- Ensure risks in all areas of the organisation are regularly monitored and mitigating strategies implemented.

- Ensure that all financial reporting obligations are met.

Business development, fundraising and income generation

- Generate funding to support the sustainability of our core services.
- Nurture current funder relationships and ensure that funder and contract expectations are met.
- Develop the organisation's funding base by identifying potential funding and contract opportunities and submitting high quality bids.
- Negotiate and deliver on grant and service level agreements.
- Identify, develop and implement new services, partnerships and business opportunities.

External relationships

- Develop relations with relevant authorities, agencies, organisations and individuals at local and national levels, including, councillors, local politicians, key funders, and local, regional and national organisations.
- Develop and sustain strong alliances with the advice network in Bristol and play a key leadership role for the network with key stakeholders, and in particular with Bristol City Council and its One City initiative.
- Liaise with the national Citizens Advice office and staff and contribute to its work at the regional and national levels where appropriate.

People leadership

- Create a positive working environment in which equality and diversity are celebrated and staff are enabled to do their best.
- Establish and implement effective recruitment, induction and staff development policies and procedures.
- Evaluate learning and development needs and ensure appropriate training and learning pathways are resourced and available to support personal development.
- Create a framework of open, timely and constructive communication for staff, volunteers and the Trustee Board.
- Champion a culture of mutual respect, inclusion and trust.
- Ensure that staff have clear objectives and targets, linked to the overall strategic plan.

Operational management and planning

- Working closely with the Trustee Board to develop, implement and monitor the delivery of business and development plans consistent with the Citizens Advice national framework and ethos.
- Ensure the development of IT and other resources needed for effective delivery of services and strategic objectives.
- Ensure that standards of service delivery are met in accordance with the Citizens Advice national quality framework, and appropriate systems are in place to monitor those standards.
- Ensure that policies and processes are regularly reviewed, understood and effectively implemented across the organisation.
- Ensure that the organisation meets all statutory and legal requirements including Health and Safety, employment and data protection (GDPR).

Person specification

Citizens Advice Bristol offers an exciting opportunity to lead an organisation that makes a real difference in its community. If you are wondering whether you might be that person, please read through the essential and desirable criteria below. If you have any questions about the role, please contact Philip Parry or Sue Evans – their contact information appears in the How to Apply section below.

Essential criteria

- Leadership experience, ideally obtained in the voluntary sector in an organisation of similar scale and complexity, ideally with a diverse workforce and large volunteer team.
- Proven ability to devise and implement strategic development and resource plans, preferably in the areas of service development, staff development and the management of change.
- Track record of sound financial management, budgeting and budgetary control.
- Experience of successful income generation through fundraising, commissioning, grant applications or business development activities.
- Management experience, including the ability to identify and develop ideas and opportunities, delegate effectively, handle pressure and multiple demands and take day-to-day decisions on the running of the organisation.
- Ensure there are appropriate policies and procedures in place, including HR policies and procedures, and a knowledge of information assurance including GDPR.
- Capable of influencing and leading change.
- Excellent communication and interpersonal skills including the ability to work collaboratively and earn and maintain the trust of existing partners, including the local authority and key funders, and to develop new collaborations and partnerships.
- An understanding of and commitment to equality, diversity and inclusion and its implications for service delivery, business development and the recruitment and management of staff and volunteers.
- An affinity for and a belief in the aims and principles of the Citizens Advice service and the value of advice services within our society.
- Desire and ability to work independently .
- Ability to provide documentation and to confirm that you have the right to work in the UK.

Desirable criteria

- Knowledge of the strategic and policy environment in which the advice sector operates.
- Experience of working with a board of trustees and a good knowledge of charity governance.
- An understanding of the voluntary advice sector.
- Experience of campaigns work which aims to influence and change policies and practice.

Terms of Appointment

Job title:	Chief Executive Officer.
Salary:	£40,000 - £45,000 pro-rata depending on experience.
Hours:	35 hours per week, on a full-time basis. We are open to the possibility of fulfilling the role on a part-time/flexible basis for example, working the equivalent of four days per week or working flexi hours. Evening hours will be required from time to time.
Contract:	This is a permanent position.
Holiday:	28 days holiday (plus bank and public holidays) pro rata if appropriate.
Pension:	We have a contributory pension scheme with an employer stakeholder pension contribution of 3%.
Location:	This role can include both office and home working, to be agreed with the successful candidate.
DBS:	In accordance with Citizens Advice policy, the preferred candidate may be required to undergo a DBS screening. However, a criminal record may not necessarily be a bar to a successful application.

What we give our staff

We provide an Employee Assistance Programme for staff which includes a confidential helpline, counselling and other benefits.

We prioritise learning and development to both fulfil individual potential and to meet our strategic plan objectives. Our Trustee Board champions a healthy and safe workplace, and we actively foster a supportive team approach which emphasises well-being and dignity at work.

We conduct an annual staff survey which gives us feedback on how we can improve our support for staff and volunteers and hold regular team meetings to encourage open communication and teamwork.

How to apply

If you would like to apply for this position, please send the following:

- ⇒ A copy of your CV outlining your employment history, academic and professional qualifications and contact details, together with names and contact details for two referees, one of which should be your current or most recent employer. (References will only be taken up if we make you an offer of employment)
- ⇒ A cover letter that sets out why you are interested in this role and clearly shows how you meet the criteria outlined in the person specification.
- ⇒ A completed diversity monitoring form.

Please submit your CV, cover letter and diversity monitoring form to Lois Thorn at lois.thorn@citizensadvicebristol.org.uk no later than 5pm on the 30 September 2021.

We anticipate that candidates will be advised if they are being invited for an interview by 8 October and that interviews will be held in the period between 11 and 15 October. Unless prevented from doing so, the intention is to hold interviews in person in Bristol.

If you have questions about the role, you can contact Phil Parry, Vice-Chair of the Trustee Board, philip.parry@citizensadvicebristol.org.uk. Sue Evans, the current Director is also happy to be contacted director@citizensadvicebristol.org.uk

Citizens Advice Bristol is committed to equality, diversity and inclusion and we welcome applications from all sections of the community. Applications from people in under-represented groups with protected characteristics are encouraged. When we select candidates for employment it is based on their aptitude and ability. We ask individuals to complete a monitoring form to help us monitor the diversity of applicants. It will be separated from your application and will not be seen by anyone involved in recruitment to this position until after the process is completed.