



Chief Executive Officer

Job pack

Thank you for your interest in working at Citizens Advice East Berkshire (CAEB). This job pack should give you everything you need to know to apply for this role and what it means to work at Citizens Advice.

In this pack you'll find:

- Letter from the Chair of Trustees
- Our values
- Overview of Citizens Advice and Citizens East Berkshire
- Key CAEB headlines from 2023/24
- The role profile and person specification
- Terms and conditions
- What we give our staff
- How to apply

Want to chat about this role?

If you want to chat about the role further, you can contact the Interim CEO, Bill Feeney at bill.f@caeb.org.uk to arrange a call.

If you have any clarifying questions about the recruitment process, please contact the Chair of Trustees, Cheryl Coppel at cheryl.c@caeb.org.uk.

**We are
Citizens Advice**

**We are
the people's
champion**

Dear Applicant

Thank you for your interest in becoming our new Chief Executive Officer.

We are looking for a confident leader for our staff and for our large pool of dedicated volunteers. You will be someone who can build strong partnerships and alliances within each of the communities we serve and who can seek local and national opportunities to bid for contracts targeted at those in most need. You will become the ambassador for our services.

This is a great opportunity to develop and shape the Citizens Advice services for over 400,000 residents who live in the boroughs of Bracknell Forest, Slough and the Royal Borough of Windsor and Maidenhead. Though the population needs vary across the areas we serve, we are there for everyone, though most of our advice is to those struggling with poverty, debt, housing and benefits issues.

Top of your agenda will be:

- Developing a volunteer strategy that reflects how volunteer models are changing in the CA network enabling us to provide advice and support to more clients
- Diversifying our funding base through both current and new funding initiatives
- Ensuring our operating model is both efficient and consistent
- Communicating the impact and value of CAEB services across multiple platforms, partners, stakeholders and funders, demonstrating our social value with data and stories

We would love you to join us to help deliver our vision of a sustainable and resilient charity reaching out into our communities and being there for people when they need us most.

Best wishes,
Cheryl Coppell
Chair of Trustees

Our mission and values

Our mission is to provide trusted advice at times of change

Provide advice fit for the future - be there for people when they need us in the ways that help make the biggest impact.

Close the gap - end the disparities in access and experience for marginalised people.

Take early action – prevent more people reaching crisis by addressing problems early.

Our Values are:

- Empowering - we are proud to help clients to understand and exercise their rights and responsibilities.
- To provide the best advice – we provide, consistent, high quality, independent advice.
- Inclusive and flexible – we adapt to the changing needs of our clients and society, promoting access to those in greatest need whilst challenging discrimination.
- Open - we are impartial, non-judgmental, act with integrity and learn from feedback.
- One team – of staff and volunteers working together and developing our services with our clients at the forefront of our minds.



How Citizens Advice works

The Citizens Advice service is made up of Citizens Advice - the national charity - and a network of around 240 local Citizens Advice members.

This role sits within this network of independent charities, delivering services across England and Wales.

84% of people using local Citizens Advice services would recommend us to a friend.

No one else sees so many people with so many different kinds of problems, and that gives us a unique insight into the challenges people are facing today.

Citizens Advice East Berkshire

Serves a population of 435,000 residents living in the areas of:

- Bracknell Forest
- Royal Borough of Windsor and Maidenhead
- Slough

We have offices or outreach services in each of the boroughs we serve.

We deliver our service through

- Phone
- Drop in
- Outreach and referral

Most initial contact is by phone. Clients who need more in-depth assistance are then offered follow up Face to Face appointments.

Our contracts target particular groups in need and we take direct referrals from the commissioners of these contracts, following up with telephone or face to face advice.

You can read our annual report for 2023/24 with [this link](#). Some headlines about our service are set out on the next page.




Citizens Advice East Berkshire – Key Headlines for 2023 /24


 Our income was £801,615


 We have 25 staff and 60 volunteers

 We helped 6,013 people

 With 30,966 issues

 We gained £2,582,654 back for clients through assisting them to gain their rightful benefits and helping them write off debts.

 Most of the people we advised had problems with benefits, debt and housing issues.

 Our clients are very diverse and many of the people we advise have disabilities or long-term health challenges.

The role

About the role

As Chief Executive Officer you will have overall executive leadership for Citizens Advice East Berkshire, 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 East Berkshire as we further develop our funding and operating models to reflect the needs of our communities across three boroughs. Building on our experience and learning over the past year, the new CEO will lead the organisation to meet client needs, emerging demands and ensure a sustainable service for our communities. 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.

Executive Aspirations for 2025

At CAEB, we look to bring together a number of strategic initiatives in 2025 that we've been focussing on during the past year. These are some of the ambitions our new CEO will need to work on:

- Developing a volunteer strategy that reflects how volunteer models are changing in the CA network enabling us to provide advice and support to more clients
- Diversify our funding base through both current and new funding initiatives
- Ensure our operating model is both efficient and consistent, and maximising distribution of existing resources
- Communicate the impact and value of CAEB services across multiple platforms, partners, stakeholders and funders, demonstrating our social value with data and stories

Job description

Strategy and Governance

- Working closely with the Trustee Board to develop, implement and monitor the delivery of business plans consistent with local needs and stakeholder requirements.
- Maintain an awareness of the operating environment such as those legislative developments, social trends and local needs likely to affect demand for advice and opportunities for service development.
- Report to the Trustee Board on progress against the business plan and agreed objectives.
- Regularly review and report to the Trustee Board on the performance of CAEB in the delivery of services and the satisfaction of funders.

Financial and risk management

- Maintain financial control of the service within budget heads agreed by the trustee board ensuring that financial resources are properly administered and monitored.
- Ensure that all finances are properly administered and monitored, and that appropriate financial regulations and controls are always in place and in use.
- Prepare and review detailed budgets for approval by the governing body in conjunction with the Treasurer and/or appropriate sub-committee and auditors.
- Oversee the preparation of accounts and financial statements in conjunction with the Treasurer and / or appropriate sub-committee and auditors.
- Ensure that all financial reporting obligations are met in relation to submissions for funding, grant aid, contracts and other initiatives.
- Ensure risks in all areas of the organisation are regularly monitored and mitigating strategies implemented.

Operational planning and management

- Ensure the continuous development of CAEB's services are in line with local and national policies and legislative and changes

- Maintain an awareness of organisational and technological developments and ensure that the service operates in ways which make best possible use of the resources available.
- 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)

Business development, fundraising and income generation

- Direct and manage the income generation function at CAEB.
- Develop and diversify the organisation's funding base by identifying potential funding opportunities, consistent with the aims of the organisation and the operating environment.
- Negotiate and review all grants, partnership and service agreements, ensuring that existing services are adequately funded and appropriate funding applications are made.
- Nurture relationships with funders, fulfilling all reporting requirements, ensuring compliance with contracts, and that robust and measurable systems are in place to report against SLAs and KPIs.

External relationships

- Working in a politically sensitive and competitive arena, maintain and develop effective relations with The Royal Borough of Windsor and Maidenhead, Bracknell Forest Council, Slough Council, and other funders, service commissioners and partners.
- Develop opportunities for partnership building and collaboration with other regional Citizens Advice offices and relevant partners.
- Nurture strong relationships with appropriate authorities, agencies, organisation and individuals at local and national levels including councillors, MPs, MEPs and local and national statutory and non-statutory organisations.

- Ensure the development of research and campaigns and instigate systems and procedures in line with the research and campaigns requirements of the membership scheme.
- Develop and oversee appropriate publicity through effective relations with the media and other community organisations and through public speaking.

People leadership

- Foster a positive working environment in which equality and diversity are central, dignity at work is upheld and staff and volunteers feel well led, can do their best, are engaged and motivated.
- Champion a culture of mutual respect, inclusion and trust.
- Ensure that staff have clear, realistic objectives and targets, linked to the overall strategic plan.
- Establish and implement effective recruitment, induction and staff development policies and procedures.
- Ensure that staff and volunteers feel supported, with effective training, performance management, supervision and appraisal.
- Enable open, timely and constructive communication for staff, volunteers and the Trustee Board.

Person specification

Qualities and values

- Commitment to working within the aims, principles and policies of the Citizens Advice service.
- Understanding of and empathy for those who experience difficulties in modern society, and a desire to empower and support them to make decisions and act upon those decisions.
- Solutions-focused, empowering and collaborative leader with evidence of continuous professional development.

Experience

- Demonstrable experience of providing inspirational leadership to an organisation going through change, ideally gained at an organisation of comparable scale and complexity (c.25 staff, c.60 volunteers and a turnover of >£800K).

- Demonstrable track record of financial management and budgetary control, and ability to manage an organisational budget under the guidance of the treasurer.
- Experience of leading, managing and motivating teams at all levels, building working relationships with colleagues, demonstrating personal commitment to organisational and staff development.
- Proven experience of building and maintaining partnerships across organisations and sectors, with a track record of successful income generation and business development through fundraising, commissioning and marketing activities.
- Demonstrable experience of influencing partners, funders and stakeholders.

Skills and abilities

- Ability to adapt your leadership style to the needs and situation of the organisation and team members.
- Ability to lead and contribute to a team, including the ability to prioritise work, identify and develop ideas and opportunities, delegate effectively, handle pressure, and take day-to-day decisions on the running of the organisation.
- A proven ability to devise and implement strategic development and resource plans grounded in an understanding of the operating environment, particularly in the areas of service development, staff development and organisational development.
- A facility for working with, and influencing the thinking of, local government councillors and officials.
- Strategic and effective approach to communication at all levels, with the ability to adapt to different stakeholder needs.
- Ability to develop and manage key organisational functions such as Finance, Fundraising & Income Generation, ICT, Facilities and HR.
- Proven ability to develop quality standards and monitor service delivery against agreed targets.

Knowledge

- An understanding of the principles of successful change management and organisational development
- Understanding of the voluntary sector and knowledge of the strategic and policy environment in which the advice sector operates.
- Demonstrable understanding of the funding landscape and how to leverage funding strategies

- Broad understanding of the operation of local and national government and the administration of public and legal services, including an understanding of commissioning.
- A good up to date understanding of equality and diversity and its application to service delivery, business development and the recruitment and management of staff and volunteers
- Desirable – a good knowledge of the technology landscape and its potential opportunities and challenges in the advice sector

Terms of Appointment

Job Title	Chief Executive Officer
Salary	circa £60,000
Contract Term	Permanent, subject to 6 months' probation period.
Hours	28 hours per week (0.8FTE). Flexibility depending on experience.
Place of work	Bracknell and Maidenhead offices, plus outreach in Slough. Primarily office-based, with some flexibility for hybrid working.
Preferred start date	Between 17 th March and 1 st April. Some flexibility depending on candidate.

What we give our staff

5% employer pension contribution

Generous holiday entitlement – 25 days plus 8 days Public Holidays

Free parking at Maidenhead and Bracknell offices

Employee Assistance Programme

Employee Perks Programme

How to apply

To apply for the role of Chief Executive Officer at CAEB, please send us **your CV and a maximum 2 page supporting statement**. The supporting statement should demonstrate how you meet the criteria outlined in the person specification and outline why you are interested in becoming the CEO of Citizens Advice East Berkshire.

All applications must be sent to the Chair of Trustees, Cheryl Coppell by emailing cheryl.c@caeb.org.uk.

Recruitment will continue until we find our preferred candidate and applications will be reviewed on receipt. There is no closing date applicable to this advert and it will be withdrawn when sufficient suitably qualified candidates have been received.

Recruitment process

Stage 1: Applications will be reviewed on receipt on a rolling basis. Selected candidates will be contacted with details (dates/times/locations) for stage 2 of the process. Telephone screening may be completed.

Stage 2: Successful Stage 1 candidates will be assessed by online interview with a recruitment panel including trustees and relevant senior staff.

Stage 3: Successful stage 2 candidates will be invited to a second interview involving selected staff and volunteers. The recruitment panel may ask for a further assessment at their discretion.

Equality and Inclusion

Citizens Advice East Berkshire are equal opportunities employers. We value diversity and welcome applications from all sections of the community. In our work we are particularly concerned to ensure those from the different and vary varied ethnicities across our patch are receiving service, also that we ensure we are reaching clients irrespective of their income levels, their gender and sexuality, their access to job market, skills and learning, age and health. Applications from people in underrepresented groups with protected characteristics are encouraged. We are dedicated to encouraging a supportive and inclusive culture amongst the whole workforce. It is within our best interest to promote diversity and eliminate discrimination in the workplace. When we select candidates for employment, promotion, training, or any other benefit, it will be on the basis of

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.