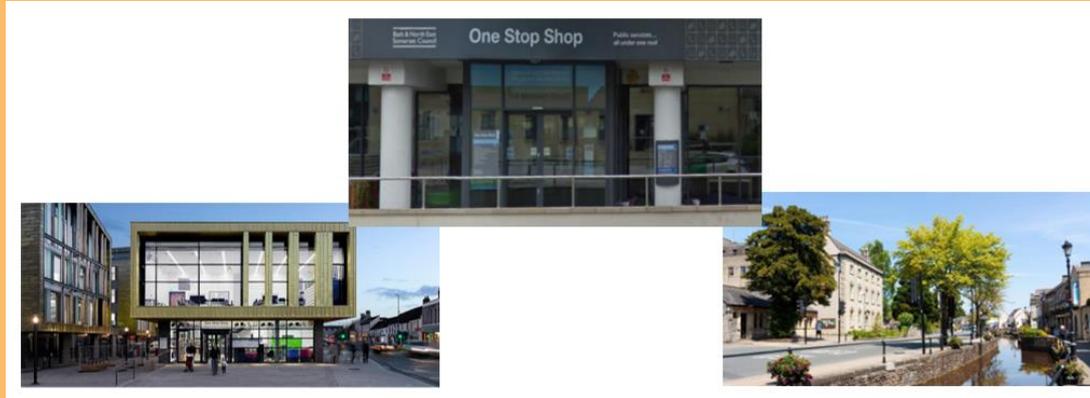


Making a difference in Bath and NE Somerset



Citizens Advice Bath & North East Somerset CEO Recruitment pack



A charity for our local
community

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Welcome from our Chair, Kate Thomas



Welcome to Citizens Advice Bath & North East Somerset (BANES) and thank you for your interest in the role of CEO. As an independent local charity, we are extremely proud of the work we do to provide guidance and support to people in our community when they need it most. In the past year we have helped over 8000 people deal with a wide range of issues, and this would not have been possible without our dedicated and knowledgeable team of staff and volunteers.

In the current economic climate we are seeing growing demand and increasing pressures on funding, and are preparing to tackle these challenges head on. We aim to: adapt to changing client needs so that we can deliver a modern and consistent service; diversify our income streams; increase brand awareness and support for our Charity; and develop partnerships with supporters, funders and other Citizens Advice offices to secure sustainable services for local people.

We are looking for someone who shares our passion for this vital work, and has experience in strategic planning, partnership development, and guiding an organisation through a period of transformative change. You will be supported by a committed and proactive Board of Trustees, and this role will be pivotal to the organisation's sustainability. If you think this fits with your expertise and ambition for a challenge, we would love to hear from you.

Kate Thomas

Chair of Trustees, Citizens Advice BANES



About us



Statement of Purpose - At CA-BANES we aim to:

Provide first class free confidential help and advice, whenever you need it, no matter how difficult the problem.

Highlight and campaign on matters of concern to local people and bring them to the attention of local decision makers and the public.

Our Vision: We will be where people need us and we will make a difference.

Our Mission: We help people find a way forward by identifying their options and guiding them to make informed choices about what to do to improve their situation. We stand up for equality and challenge discrimination.

About us



Where we are and what we do:

Our main office base is in a Georgian property in Bath City Centre. From here we run telephone support, training sessions for volunteers and offer appointments to clients with more complex problems. Drop in sessions are held in Council One Stop Shops in Bath, Midsomer Norton and Keynsham where co-location with council and other services helps us to work effectively together.

Most of our clients are struggling financially and many face extremely challenging circumstances – problems do not seem to come alone! Advisers are trained to use high quality information resources to ensure the accuracy of advice, and equally importantly, to work respectfully and non-judgmentally with clients to help them to achieve the best possible outcomes.

We identify many policies and practices that are making life even more difficult for the people we help, and we use the evidence from our work to campaign for change and promote fairness and social justice. Bath was one of the Universal Credit pilot areas and the work of our Research & Campaigns team has been instrumental in influencing policy changes at national level.

We are run as a local independent charity, but hold membership to the national Citizens Advice charity. Citizens Advice is made up of a network of 280 local offices with services provided by over 22,000 trained volunteers and 7,000 paid staff.

Here at Citizens Advice BANES, our annual income is approximately £500k. We have 16 members of paid staff (some part time) and around 100 volunteers (who on average work 1-2 days a week)

Words from our retiring Director, Gill Whitehead



After over 12 years with the Citizens Advice service, including almost 5 years as Director of Citizens Advice BANES, I have decided to retire.

It has been a privilege to work with such a highly regarded local charity and I will leave with many cherished memories of the people I have encountered along the way including staff, volunteers, clients, trustees and colleagues in partner organisations. I am proud to have been a part of a dynamic organisation dedicated to its twin aims of helping individuals to solve problems and influencing policy at every level.

Our staff and volunteers come from a wide range of backgrounds but all are passionate about making a difference to the local community. They meet challenges head on and do a tremendous job for clients in very difficult circumstances.

I am particularly proud of the strong relationships we have with our partners and funders, specifically Bath and NE Somerset Council, Wessex Water, Curo, Macmillan, Dorothy House, Bath Mind and many others. As a member of the Core Group and a founding trustee of the recently constituted 3SG BANES, our local third sector network organisation, I have been actively building partnerships with a large number of local organisations in order to help strengthen the sector locally. My colleagues in other Local Citizens Advice organisations have also been a source of strength and support and this is likely to bring new opportunities for joint working in the future.

Working with Citizens Advice in BANES will provide my successor many opportunities for taking the service in new directions, while building on existing strengths. It will require dedication and energy as we live in challenging times, but the need for our service has never been greater.

Gill Whitehead



What our clients say?

At the heart of our work are our clients, we take time to listen and gain detailed feedback on what they say. Here are some recent comments:-

"The drop in centre was so helpful and so friendly. I was really worried before I went."

"I really admired the staff. They were so knowledgeable."

"I had 85 pages on this form. If it hadn't been for CAB, I don't know where we would be."

"Let's hope we never lose them. They are brilliant. So compassionate. You felt they really cared and wanted to help."

"They were really helpful."

"They helped me get food on the table and £15 for electric and gas."

"After the Job Centre couldn't help there was no one to speak to. I knew they (CAB) would do things properly."

"They are a great help when there is no-one else there to help you."

"I want them to write letters and fill out forms for me."

"I can't do my paperwork, I get in a muddle. They fill out my forms with my poor eyesight I can't see."

"It's the same form each time I need help with getting my disability benefits sorted."

"CAB is the first place I go to. They are for problems that crop up in life that I need help with."

"They are always there for you. They always help you the best they can."

"They make phone calls for you that you would feel uncomfortable doing. They know they right things to say."

"I'm no good at finding information. CAB are a darn site better than me!"

"If I need any information I go automatically go to the CAB."

"I'm no good at dealing with the system. I feel out of my depth. It's handy to know someone to go to."

"If it hadn't been for CAB, I've no idea what would have happened. The real Salvation Army I suppose."

"CAB helped me to get back to where I am now. I was on drugs, addicted to pain killers. I was numb. I was bed bound. I lived on a sofa for two years, CAB saved my life."

"I was told that the DHSS were not going to help with living costs. CAB helped get all the information I needed. "

"The benefits system has changed. Makes you want to go out and commit a crime and cost the state even more money".

What our volunteers say....

Without generous volunteers we could not operate, these are some of their views on why they do it ..

What is the best thing about volunteering at CA-BANES?

Being able to do a really effective job - changing lives. The core values.

The opportunity to contribute information on issues of great social importance

Having the opportunity to enable clients to improve their lives

Personal development and an opportunity to give something back

Seeing the positive impact we can make on client's lives

Specialising in benefit appeals gives me the opportunity to make a difference

by ensuring that clients are awarded the benefits they are entitled to (as we are very s

At the staff meetings they have very good guest speakers with interesting topics.

A strong sense of camaraderie and a sense of making a difference

The chance to help people who want to transform their lives

Feeling that I have made a difference



What our funders say...



Citizens Advice BANES makes a huge difference on the lives of people in B&NES that need support the most. CAB is now as important as it has ever been, we at St John's recognise this through our Individual Funding programme as well as through funding CAB directly to carry out all of your fantastic work. It is our job to support the work of organisations like yours, we recognise that you are the ones that are making the difference to people's lives.

Below is also the quote from the beneficiary that worked with your colleagues and was funded by St John's.

"I have been worrying and stressing about the amount of money I owe for so long. And I finally feel like I can breathe again. Thank you so much for sorting all of this out for us. You have been amazing. I've told Curo how supportive and helpful you have been throughout this whole process. I really couldn't have gotten through it without you. Thank you again. You're a credit to the Citizens Advice Bureau and I would certainly highly recommend the CAB to anyone based on the service you have provided."



Sam Gillett
Funding and Impact Manager

Person Specification (1)

Chief Executive Officer Citizens Advice Bath & North East Somerset Person Specification

	Knowledge / Qualifications / Experience	Essential	Desirable
1	Successful track record in a senior leadership role gained in a complex organisation with experience of both articulating vision and delivering results through substantial transformational change	✓	
2	Experience in keeping an organisation to its mission at every level and delivering services that deliver to client and commissioner needs	✓	
3	Proven record in managing and developing high-performing teams in a collaborative way	✓	
4	Refuses to accept anything other than the highest quality services despite a potentially resource limited environment	✓	
5	Commitment to the aims, principles and policies of Citizens Advice Bath and North East Somerset	✓	

6	Excellent financial management with proven experience of leading and delivering income generation/diversification strategies and building financial sustainability	✓	
7	Willingly seeks out possible collaborations and partnerships and has success in getting results with services that have provided good outcomes for clients/customers	✓	
8	Experience in a commercial or competitive “for profit” environment		✓
9	A highly effective external ambassador– with evidence of effective and purposeful engagement with a range of external stakeholders and influencing key decision makers	✓	
10	Good understanding of the advice and voluntary sector		✓
11	Experience in managing across multiple locations		✓
12	Experience in managing volunteers (alongside permanent staff)		✓
13	Graduate degree or equivalent	✓	

Person Specification (2)

	Skills and abilities	Essential	Desirable
14	Strong strategic thinking, planning and implementation skills	✓	
15	Highly experienced and effective communicator - a clear public speaker capable of delivering complex messages to a variety of audiences including the media	✓	
16	Proven ability to create and maintain positive relationships with staff and a wider range of stakeholders, and to work collaboratively with partners.	✓	
17	Ability to make good decisions in a fast-moving environment	✓	
18	Highly skilled in leadership and team management with ability to delegate appropriately	✓	
19	Proven ability to successfully manage difficult relationships/situations	✓	

Personal styles and behaviours

- Flexibility in approach and mindset. Open to new ideas and information
- Resilience and mental toughness
- Inspirational, dynamic, persuasive, tactful, outward-facing personality
- Ability to multitask and work to strict deadlines – a completer finisher
- Drive, tenacity, focus; a wish to succeed and make things happen
- Passion for and commitment to working to improve opportunities for the citizens of Bath and North East Somerset

Additional requirements

- It is expected that the post-holder will work flexibly to meet the operational needs of the Charity, this may include out of hours work.

The role, main areas of responsibility (1)



Chief Executive Officer Job Description

Role Purpose: To be responsible for the strategic development, day to day financial management and operation of the organisation, generating income and maintaining successful relationships with stakeholders.

Context of role: The post holder will lead and manage the Local Citizens Advice in Bath and NE Somerset and will be responsible to the Trustee Board.

Main areas of responsibility

Planning and development

Design, develop, implement and monitor the business and development plan recognising the strengths, weaknesses, opportunities and threats that prevail.

- Manage the strategic direction of the service to ensure that the development of the charity, its management and its services to clients reflects and supports the organisation's equality and diversity strategy
- Translate organisational objectives into team and individual work plans with clear and realistic targets
- 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
- Develop IT and other resource needs and strategies recognizing local requirements and where appropriate adopting National Citizens Advice guidelines
- Participate in National Citizens Advice initiatives as appropriate and contribute to the work of national and regional committees and working parties when possible and relevant.

The role, main areas of responsibility (2)



Governance - supporting the Chair and Trustee Board

- Maintain a close supportive relationship with the Chair and Board, managing and reporting upon all key areas of Governance
- Arrange and attend appropriate Board and related meetings, including the annual general meeting and any special general meetings
- Report to and advise the Chair and Trustees on financial, staffing and service delivery issues and on National CA compliance where appropriate and all other relevant legislation, e.g. company & charity law, health & safety, employment etc.
- Maintain a full risk register, showing the likelihood and impact of principle risks and their mitigation and ongoing management.
- Report to the Trustee Board on progress against the business plan and agreed objectives
- Prepare and draft the organisation's annual report for agreement by the Chair and Board for wider publication and submission to statutory bodies.

Service delivery

- Develop and encourage a culture within the organization which is wholly client focused, recognizing staff and volunteers who evidence supporting behaviours and challenging anything less than this.
- Lead and support the management team to achieve the right outcomes for the organization and for the client
- 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 to meet the client needs

The role, main areas of responsibility (3)



Public Relations and Research & Campaigns

- Act as the “public face” of CA BANES in all outward / external facing activities
- Promote and protect the aims, principles, policies, interests and reputation of the CA BANES service both locally and nationally and ensure that the organisation has a high profile at all times
- Ensure the development of research and campaigns in line with set guidelines and procedures.
- Develop and oversee appropriate publicity through effective relations with the media and other community organisations, and through public speaking
- Develop effective relations with appropriate authorities, agencies, organisations and individuals at local and national levels, including councillors, MPs, MEPs and local and national statutory and non-statutory organisations
- Liaise with National Citizens Advice and contribute to its work at regional and national levels where appropriate

Resource acquisition

- Research and respond to advice needs, in particular the needs of identified disadvantaged groups and the different geographical and demographical areas
- Develop the organisation's funding base by identifying potential funding opportunities consistent with the aims of the organisation and the operating environment, and applying for funding across an increasingly diversified income stream seeking longer term sustainability.
- Negotiate and review all grants and service agreements reporting to the Chair and Board as necessary, ensuring that existing services are adequately funded and appropriate grant applications are made
- Maintain appropriate relations with funders, fulfilling all reporting requirements and ensuring compliance with contracts

The role, main areas of responsibility (4)



Financial management

- Oversee day-to-day financial control of the service and successful allocation of resource and headcount
- Prepare and review detailed budgets for approval by the Trustee Board in conjunction with the honorary treasurer and / or appropriate sub-committee and auditors
- Make regular reports to the Trustee Board on income, expenditure and any variations from budgets
- Oversee the correct preparation of accounts and financial statements in conjunction with the honorary 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 any other initiatives

Staff management

- Ensure the successful motivation and management of a high performing team of staff and volunteers with delegated authority successfully carrying this forward to all levels in the organization
- Create a positive working environment in which equality and diversity are well-managed and dignity at work is upheld.
- Chair regular meetings of the management team and collectively and / or separately, meetings with all staff and volunteers
- Nurture a positive and beneficial relationship with staff and volunteer reps as necessary
- Implement, manage and monitor all appropriate employment policies and procedures

How to apply

For an informal discussion about this role or more information please contact: Emily Davies on 01225 303812 or Emily.Davies@cab-banes.org

- Please complete the accompanying application form and send it with a CV outlining your career history to Emily.Davies@cab-banes.org by Monday 4th February 2019.
- Please also indicate your notice period for your current role
- Interviews and related exercises will take place during the week commencing 25th February in Bath

CLOSING DATE: Monday 4th February 2019

INTERVIEWS: Week commencing 25th February