

# **Recruitment pack**

## **Chief Executive**

### **October 2025**



Thank you for your interest in working at Citizens Advice Bath and NE Somerset. This pack will give you everything you need to know to apply for this role and what it means to work for us.

In this pack you'll find:

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## **Message from the chair**

Citizens Advice Bath and NE Somerset does immensely important work helping some of the most disadvantaged people in our locality. We are very fortunate to have an extremely talented and motivated team of staff and volunteers but the role of CEO remains crucial to our continuing success.

The existing postholder, Simon Lawson, is stepping down after four years, though he will stay on until a successor is in post to ensure a smooth handover to the new CEO.

The successful candidate will have a fantastic opportunity to shape the future direction of the charity as it continues to expand and also extend the range of its services from our new, city centre offices and will be fully supported by the Trustee Board.

I very much hope that you will be interested in this exciting role and, if you would like an initial discussion, please do contact me on [dan.lyons@cab-banes.org](mailto:dan.lyons@cab-banes.org)

Dan Lyons – Chair of Trustees

## About Citizens Advice Bath and North East Somerset

Citizens Advice Bath and NE Somerset is an independent local charity providing information and advice to residents of the Bath and NE Somerset (B&NES) area. We aim to empower people to resolve their problems and change their lives for the better.

We provide free, independent and confidential advice; whoever you are, whatever the problem. We help people overcome their problems and campaign on big issues when their voices need to be heard. We value diversity, champion equality, and challenge discrimination and harassment.

We're here for everyone in the Bath and NE Somerset area and we work in partnership with other local services to provide the best possible advice and information to meet the needs of local residents.

We offer information and generalist advice on any issue and specialist benefits and debt advice. We also offer specialist legal advice delivered by professionals acting on a pro bono basis. We offer advice by phone and face-to-face appointments. Details of all our advice services are on our website – [www.citizensadvicebanes.org.uk](http://www.citizensadvicebanes.org.uk)

We currently employ 30 paid staff and have around 100 volunteers who deliver most of our generalist advice service and for a variety of support roles. Our current annual turnover is just over £1M; we actively seek to develop new projects and services to meet identified need. We are members of the national Citizens Advice network and hold the Advice Quality Standard. We are founding partners of the local Community Wellbeing Hub.

As well as giving advice we aim to prevent the problems that affect people's lives – we collect evidence of practices and policies that cause the issues we help with; our knowledge of clients' problems and circumstances enable us to campaign for change to get a fairer deal for everyone.

## Our values – how we will act

- We aim to be inventive, curious and collaborative, across and beyond the organisation.
- We respect and actively support individuality and diversity.
- We are passionate about our mission; we challenge situations that are unjust and unfair and act with focus and compassion.

## **Our impact**

During 2024-25:

We helped 5,961 local people

We dealt with 20,960 advice issues

Top three advice issues – welfare benefits, utilities & energy, debt

63% of clients disabled or long-term health condition; 12% from a BAME background

Recorded financial gains of £7,010,650 for local communities

90% of clients would recommend the service

## **Role profile**

### **Purpose**

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

Reports to: trustee board

Direct reports: two service managers (part-time) office manager; IT support

### **Key responsibilities**

#### *Planning and development*

Design, develop, implement and monitor the business and development plan

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 legislative developments, social trends and local needs

Participate in National Citizens Advice initiatives as appropriate

## *Governance*

Maintain a close and supportive relationship with the Chair and Board, managing and reporting upon all key areas of governance

Arrange and attend 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

Be responsible for ensuring that the organisation meets its compliance commitments to maintain the Advice Quality Standard, and to the Charity Commission, Companies House, Financial Conduct Authority, the Information Commissioners Office, National Citizens Advice and any other relevant regulators.

Maintain and update a risk register, showing the likelihood and impact of principal risks and their mitigation and management

Report to the Trustee Board on progress against the business plan and agreed objectives

To act as the company secretary.

## *Service delivery*

Develop and encourage a client focused culture within the organisation

Lead and support the management team to achieve the right outcomes for the organisation and for clients

Maintain an awareness of organisational and technological developments and ensure that the service takes full advantage of opportunities, while managing any identified risks.

## *Public Relations and Research & Campaigns*

Act as the public face of CA BANES in all outward facing activities

Promote the interests and reputation of the CA BANES service both locally and nationally

Oversee the development of the research and campaigns function

Develop and oversee appropriate publicity through effective relations with the media and other community organisations

Develop effective relations with appropriate authorities, agencies, organisations and individuals at local and national levels, including councillors, MPs, 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

#### *Resources and income*

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

Seeking new funding to diversify income streams and longer term sustainability

Negotiate and review all grants and service agreements reporting to the 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

#### *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 liaising with the treasurer and finance sub-committee

Report to the Trustee Board on income, expenditure and any variations from budgets

Oversee the correct preparation of accounts and financial statements, liaising with the treasurer, finance sub-committee and external auditors

Ensure that all financial reporting obligations are met

#### *Staff management*

Ensure the successful motivation and management of staff and volunteers with appropriate delegated authority

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 staff and volunteers

Implement, manage, monitor and update all appropriate employment policies and procedures

### *General*

Monitor and respond to client complaints, as appropriate

Ensure adequate office premises, that comply with all relevant legislation

Act as health & Safety Officer for the organisation

Oversee use and management of IT resources.

## **Person specification**

### Essential Criteria

A commitment to improving lives through the delivery of an advice service

Successful track record in a senior leadership role gained in a complex organisation

Ability to identify, assess and manage organisational risks, and to lead effectively during times of uncertainty or crisis

Experience in keeping an organisation to its mission at every level and delivering services that deliver to client and commissioner needs

Proven record in managing and developing high-performing teams in a collaborative way

Ensures highest quality services are delivered, despite a potentially resource limited environment

Commitment to the aims, principles and policies of Citizens Advice Bath and North East Somerset

Excellent financial management with proven experience of leading and delivering income generation/diversification strategies and building financial sustainability

Willingly seeks out possible collaborations and partnerships and has success in getting results with services that have provided good outcomes for clients/customers

A highly effective external ambassador– with evidence of effective and purposeful engagement with a range of external stakeholders and influencing key decision makers

Graduate degree or equivalent

Strong strategic thinking, planning and implementation skills

Highly experienced and effective communicator - a clear public speaker capable of delivering complex messages to a variety of audiences including the media

Proven ability to create and maintain positive relationships with staff and a wider range of stakeholders, and to work collaboratively with partners.

Ability to make good decisions in a fast-moving environment and to delegate appropriately

Proven ability to successfully manage difficult relationships/ situations

#### Desirable Criteria

Good understanding of the advice and voluntary sector

Experience in managing across multiple locations

Experience in managing volunteers (alongside permanent staff)

#### 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

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.

## Terms and conditions

Location: based at our main office in Bath, with occasional home working

Salary: £55,000 pa

Hours: 37.5 per week (open to flexible working arrangements)

Contract: permanent

Job offers are subject to the receipt of two satisfactory references, including from the current or most recent employer.

The successful candidate must have the right to work in the UK and we will ask for documentary evidence of this.

## What we offer our staff

- 6% employer pension contribution
- Employee assistance programme
- Five weeks paid annual leave, plus all bank and public holidays
- Three days additional paid leave between Christmas and new year
- Flexible working arrangements

## Recruitment timetable and how to apply

Closing date for applications: Monday 3 November 2025; 10.00am

First interview (online): Wednesday 12 November 2025

Second interview (in person; central Bath): Wednesday 19 November 2025

To apply, please send a cv and covering letter (max. 1,000 words), explaining how you meet the person specification; you should also download and complete an equalities monitoring form from [our website](#) and return the documents -

- by email to the office manager [emily.davies@cab-banes.org](mailto:emily.davies@cab-banes.org)
- by post to Citizens Advice Bath & NE Somerset, 5 Palace Yard Mews, Bath BA1 2NH.

For an informal discussion about the role, please email the trustee board chair to arrange a convenient time - [dan.lyons@cab-banes.org](mailto:dan.lyons@cab-banes.org)

*Citizens Advice Bath and North East Somerset is the operating name of Bath and District Citizens Advice Bureau, a registered charity and company limited by guarantee. Charity Registration Number: 1025392; Company Registration Number: 2845028 England; Registered office: 5 Palace Yard Mews, Bath, BA1 2NH; Financial Conduct Authority Number: 617504*